Exporting Invoices in 25Live Accounting

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Using 25Live Accounting requires a specific set of steps in 25Live:

1. Generate pricing information for an event based on automatic calculations from existing price sheets
2. Modify the event's pricing as desired (adjusting existing line items or adding new ones)
3. Export the pricing information in an invoice to FreshBooks
4. Track the invoice details (such as the outstanding balance) on the 25Live pricing page

These steps are described in detail below.

> ℹ **Note: "Print Invoice" vs "Export Invoice" vs "Create Invoice"**
>
> **Print Invoice**: Generate an invoice for the entire event or select a custom invoice.
>
> **Create Invoice**: Create a custom invoice by breaking the event up by occurrence.
>
> **Export Invoice**: Send your pricing details to FreshBooks.

Generating Pricing Information for an Event

Pricing is calculated automatically for an event every time it is saved. Adding or removing items such as locations, resources, and requirements may change the pricing totals. Adjusting an event's duration or changing its start time can also affect pricing.

Changes to underlying rate schedules may not be immediately reflected on existing events. If you make changes to your rates, click **Refresh Pricing** for an individual event to update its pricing calculations.

See the sidebar for more information on configuring rate groups, rate schedules, price sheets and taxes.
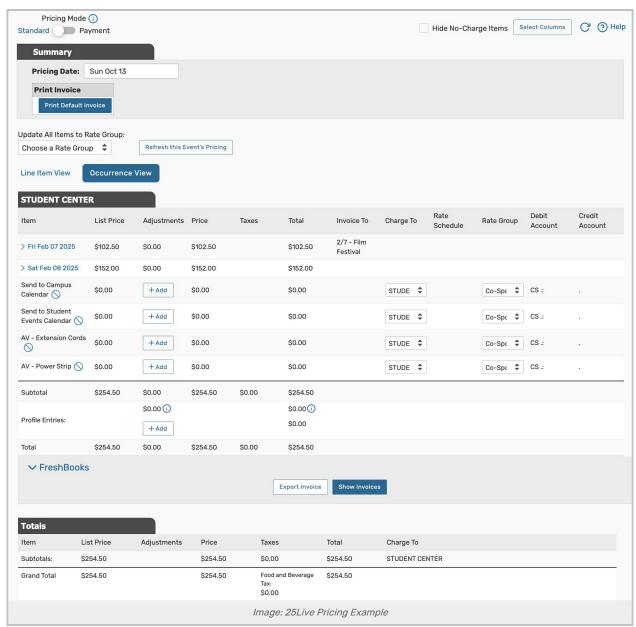
Modifying an Event's Pricing

After everything has been automatically calculated, you can make further adjustments on an event's Pricing tab in 25Live to account for individual circumstances. If an event has related events, you can view all their pricing details at once by checking the box labeled "Show Related".

Options for modifying event pricing include:

- Setting the effective date for calculating prices
- Manually adjusting individual line items by specific dollar amounts or percentages
- Adding or subtracting surcharges and discounts from the overall total
- Changing the rate schedule or rate group for an individual line item
- Dividing billable items between an event's organizations

See [Viewing and Modifying Event Pricing](#) for more information on adjusting pricing in 25Live.

Note that you can continue to modify an event's pricing even after you export an invoice. (See below for instructions.) If you do so, those changes are not recorded in FreshBooks until you export the invoice again.
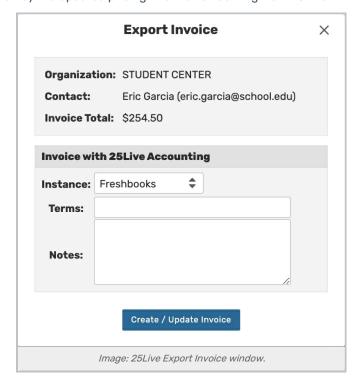

Image: 25Live Pricing Example

Exporting an Invoice

When you are satisfied with an event's pricing, it's time to [generate an invoice](#) to share with a customer.

Click **Export Invoice** below the total pricing for an organization to generate a FreshBooks invoice number and link it with 25Live. You may customize the text fields for terms and notes, which are filled out by default with basic information about the event.

If the event pricing changes after the invoice is exported, you should export the invoice again. This will preserve the same invoice number in FreshBooks and update the details of the invoice there. Edits to individual line items in that

application will be overwritten by the updated pricing information coming from 25Live.

Image: 25Live Export Invoice window.

Multiple Invoices on Events

There are some circumstances that allow you to export more than one FreshBooks invoice per event.

- Events with multiple organizations can generate one invoice per organization.
- Related events can export an extra invoice. One invoice is for the event by itself and the other is for the set of events as a whole, including pricing details from each related event. It's up to you to choose which invoice to send to your clients for billing.

Organizations With Multiple Billing Contacts

A "client" is matched in FreshBooks with a combination of the 25Live organization being billed and the organization's billing contact. If an organization has more than one such contact, you must choose which one to use each time you generate an invoice.

The invoice is attached to the corresponding client (organization plus contact) tracked in FreshBooks.

Tracking Invoice Details in 25Live

Once an invoice has been generated in FreshBooks, its details are visible on the 25Live event pricing page beneath the total price for an organization. Click **Show Invoice** to reveal these details after loading a page.

Image: The invoice status bar (bottom) shows the invoice number assigned in 25Live Accounting.

The information bar includes the status of the invoice, its outstanding balance, and links to **view** or **edit** its details. (This requires authorization in FreshBooks.)

As payments are received and recorded, this area will automatically update with the most current information.

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