Preparing Your Environment for 25Live Accounting

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Setting up 25Live Accounting is simple. To get started, follow these steps:

1. Contact your Series25 Account Manager to enable the FreshBooks connection
2. Configure FreshBooks users and settings
3. Prepare client organizations in 25Live
4. Set up pricing formulas in 25Live
5. Ensure that 25Live users have appropriate security permissions
6. Start creating invoices!

Each of these steps is described in detail below.

Enabling the FreshBooks Connection

25Live Accounting is an optional part of Series25 and carries no extra required cost, but enabling it requires a service selection addendum to your licensing agreement. Contact your Series25 Account Manager at series25implementation@collegenet.com for more information.

The basic accounting functionality provided by CollegeNET includes a single accounts receivable environment and a limited number of licenses. If you need additional users or more AR environments (for example, to have separate instances for athletics and concerts accounting) then this is available for a fee and requires configuration separately.

There is no limit to the number of client organizations you can track and invoice in 25Live Accounting, but if you require more than 500 clients then please let CollegeNET know. (There is no additional fee for going beyond 500 clients.)

Once you have discussed all this with your Series25 Account Manager, CollegeNET will enable FreshBooks for your 25Live Accounting environment.

Configuring Users in FreshBooks

Your Series25 Account Manager will set up an administrator account in FreshBooks as part of enabling 25Live Accounting. This administrator needs to create additional staff member users to be part of your AR team.

1. Use the Instance Login URL provided for your FreshBooks instance.
2. In FreshBooks, click the People tab, then click Staff and Contractors.
3. Click the button to add a New Team Member.
   A help pop-up describes the types of team members available. You'll probably want your users to perform the functions of "Staff."
4. Click Add Staff Member.
   A warning advises you if your staff/user limit has been reached.
5. Provide the initial required information for the new staff member: Email and Name. Then select "Assign username

and password."
You'll probably want to enter the email address for Username.

6. Save the staff record.

> ✅ **Deciding How Many 25Live Accounting Users You Need**
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> There is no one-to-one relationship requirement between a 25Live user and an individual performing AR tasks in the 25Live Accounting tool.
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> If you decide that you need more than the basic five additional usernames, contact your Series25 Account Manager, or send an email to series25implementation@collegenet.com

Preparing Client Organizations

Pricing and billing in 25Live is done on the basis of organizations. When you generate an invoice for an event in 25Live, any organizations associated with it are converted to clients in FreshBooks.

In order to function with 25Live Accounting, an organization must have at least one billing contact configured in 25Live. Search for the organization you need, then use the instructions in Inline Editing Organization Details to find and edit the "Billing Contact" field. Search for a contact's name and select from the list of results. Repeat to add as many billing contacts as you desire. You will choose from among these contacts when generating an invoice.

> ℹ️ **Client Management in FreshBooks**
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> - You can use the People > Assign Clients functionality to control which clients are managed by which staff.
> - If you need more than 500 clients, contact CollegeNET.

Configuring 25Live Pricing Formulas

Invoices generated for 25Live Accounting are populated by pricing information calculated by 25Live formulas. You can create rate schedules for locations, resources, and more and assign different price sheets to different organization types (e.g. Internal vs For-Profit).

Refer to Series25 Pricing Formula Variables for a guide on setting up pricing formulas.

Configuring 25Live Pricing Security

Appropriate security must also be granted to any user group whose members need to be able to use 25Live pricing and accounting functionality. This requires the "Edit Pricing on Events" permission in Series25 Group Administration as well as the ability to edit an event.

1. Log in to Series25 Group Administration.
2. Select the group(s) of users who will generate invoices for 25Live Accounting and click Configure Security.
3. In the Basic Options area, select "Yes" for setting 3.1 - Edit Pricing on Events.

For information on setting the functional and object security of 25Live security groups, see our documentation on Series25 Group Administration.