

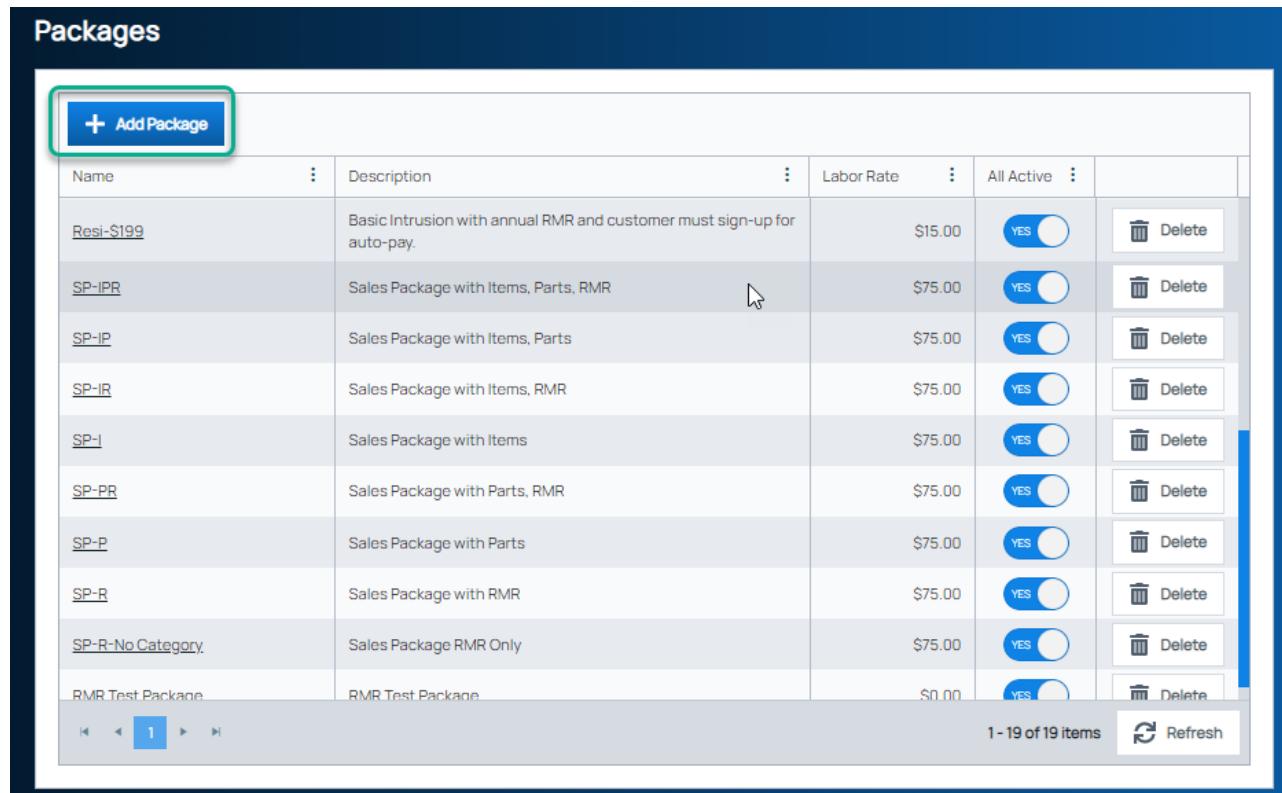
Add a Package

Last Modified on 01/20/2026 4:21 pm EST

When creating a new package, first enter a description and select optional labor and discount codes and values. Once the package record is created, build the package by selecting items, parts, and RMR.

To add a new package, from the main menu, browse to Package setup: Setup > Proposals > Packages.

The Packages list opens. Click the **Add Package** button at the upper left of the page.



The screenshot shows a list of packages in a software application. The 'Add Package' button is highlighted with a green box. The table columns are: Name, Description, Labor Rate, All Active, and Delete. The data rows are:

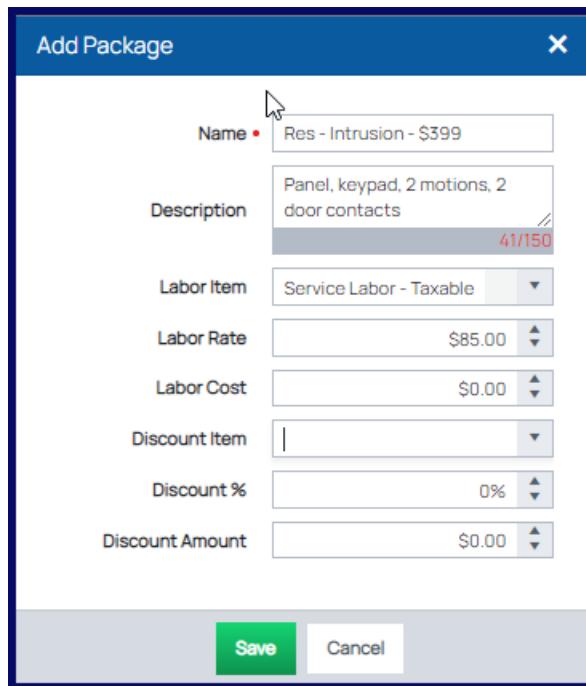
Name	Description	Labor Rate	All Active	Delete
Resi-S199	Basic Intrusion with annual RMR and customer must sign-up for auto-pay.	\$15.00	<input checked="" type="checkbox"/>	
SP-IPR	Sales Package with Items, Parts, RMR	\$75.00	<input checked="" type="checkbox"/>	
SP-IP	Sales Package with Items, Parts	\$75.00	<input checked="" type="checkbox"/>	
SP-IR	Sales Package with Items, RMR	\$75.00	<input checked="" type="checkbox"/>	
SP-I	Sales Package with Items	\$75.00	<input checked="" type="checkbox"/>	
SP-PR	Sales Package with Parts, RMR	\$75.00	<input checked="" type="checkbox"/>	
SP-P	Sales Package with Parts	\$75.00	<input checked="" type="checkbox"/>	
SP-R	Sales Package with RMR	\$75.00	<input checked="" type="checkbox"/>	
SP-R-No Category	Sales Package RMR Only	\$75.00	<input checked="" type="checkbox"/>	
RMR Test Package	RMR Test Package	\$0.00	<input checked="" type="checkbox"/>	

The Add Package form opens.

Add Package

Name	• <input type="text" value="Res - Intrusion - \$399"/>
Description	<input type="text" value="Panel, keypad, 2 motions, 2 door contacts"/> 41/150
Labor Item	<input type="text" value="Service Labor - Taxable"/>
Labor Rate	<input type="text" value="\$85.00"/>
Labor Cost	<input type="text" value="\$0.00"/>
Discount Item	<input type="text"/>
Discount %	<input type="text" value="0%"/>
Discount Amount	<input type="text" value="\$0.00"/>

Save **Cancel**



Data Entry Fields

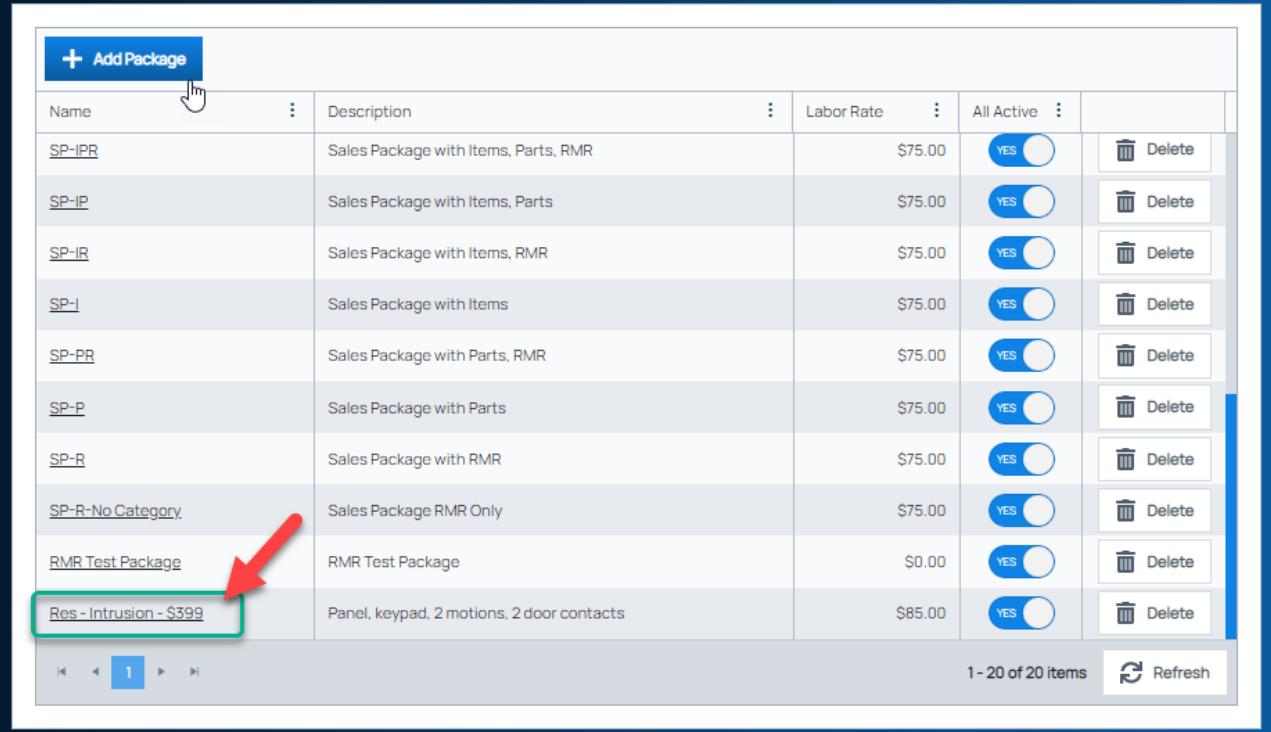
Data entry fields preceded by an asterisk are required.

- ***Name:** Type in a short description for the package. Maximum of 25 characters.
- ***Description:** Type in a long description for the package. You may want to enter what is included in the package. Maximum of 150 characters.
- **Labor Item:** If you want to have a line item appear for labor, select the appropriate item code from the list.
- **Labor Rate:** If an item was selected in the Labor Item field, enter the labor rate to charge the customer.
- **Labor Cost:** If an item was selected in the Labor Item field, enter your cost for the labor. This is for reporting purposes.
- **Discount Item:** If you want to have a line item appear for a discount on the package, select the appropriate item code from the list.
- **Discount %:** If an item was selected in the Discount Item field, you can either enter a percentage value or a flat amount in the Discount Amount field. If opting to enter a percentage value, the software will automatically calculate the discount amount.
- **Discount Amount:** If an item was selected in the Discount Item field, you can either enter a percentage value or a flat amount in this field.

When finished, click the **Save** button at the bottom of the form.

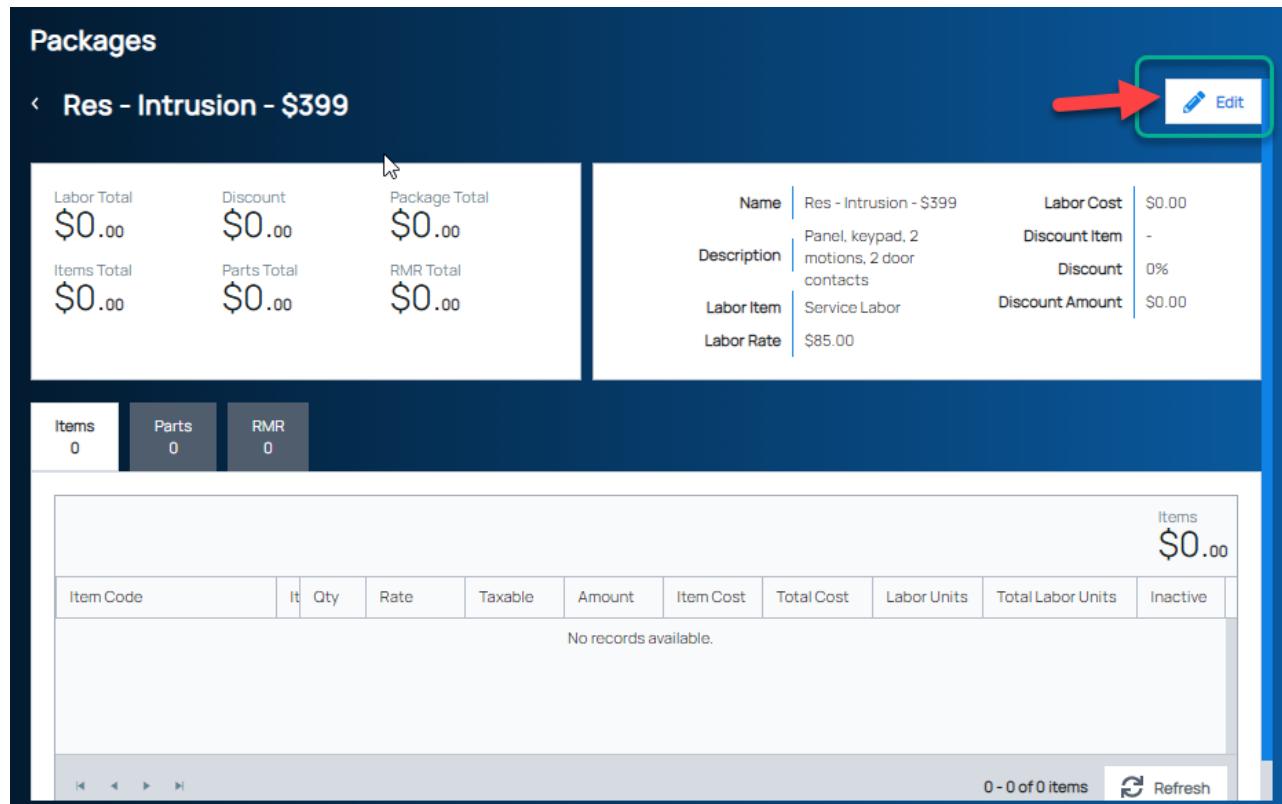
In the list, locate the package record you just created, and then click on the hyperlink in the Name column.

Packages



+ Add Package					
Name	Description	Labor Rate	All Active		
SP-IPR	Sales Package with Items, Parts, RMR	\$75.00	<input checked="" type="checkbox"/>		Delete
SP-IP	Sales Package with Items, Parts	\$75.00	<input checked="" type="checkbox"/>		Delete
SP-IR	Sales Package with Items, RMR	\$75.00	<input checked="" type="checkbox"/>		Delete
SP-I	Sales Package with Items	\$75.00	<input checked="" type="checkbox"/>		Delete
SP-PR	Sales Package with Parts, RMR	\$75.00	<input checked="" type="checkbox"/>		Delete
SP-P	Sales Package with Parts	\$75.00	<input checked="" type="checkbox"/>		Delete
SP-R	Sales Package with RMR	\$75.00	<input checked="" type="checkbox"/>		Delete
SP-R-No Category	Sales Package RMR Only	\$75.00	<input checked="" type="checkbox"/>		Delete
RMR Test Package	RMR Test Package	\$0.00	<input checked="" type="checkbox"/>		Delete
Res - Intrusion - \$399	Panel, keypad, 2 motions, 2 door contacts	\$85.00	<input checked="" type="checkbox"/>		Delete

The package record opens. Click the **Edit** button at the upper right of the page.



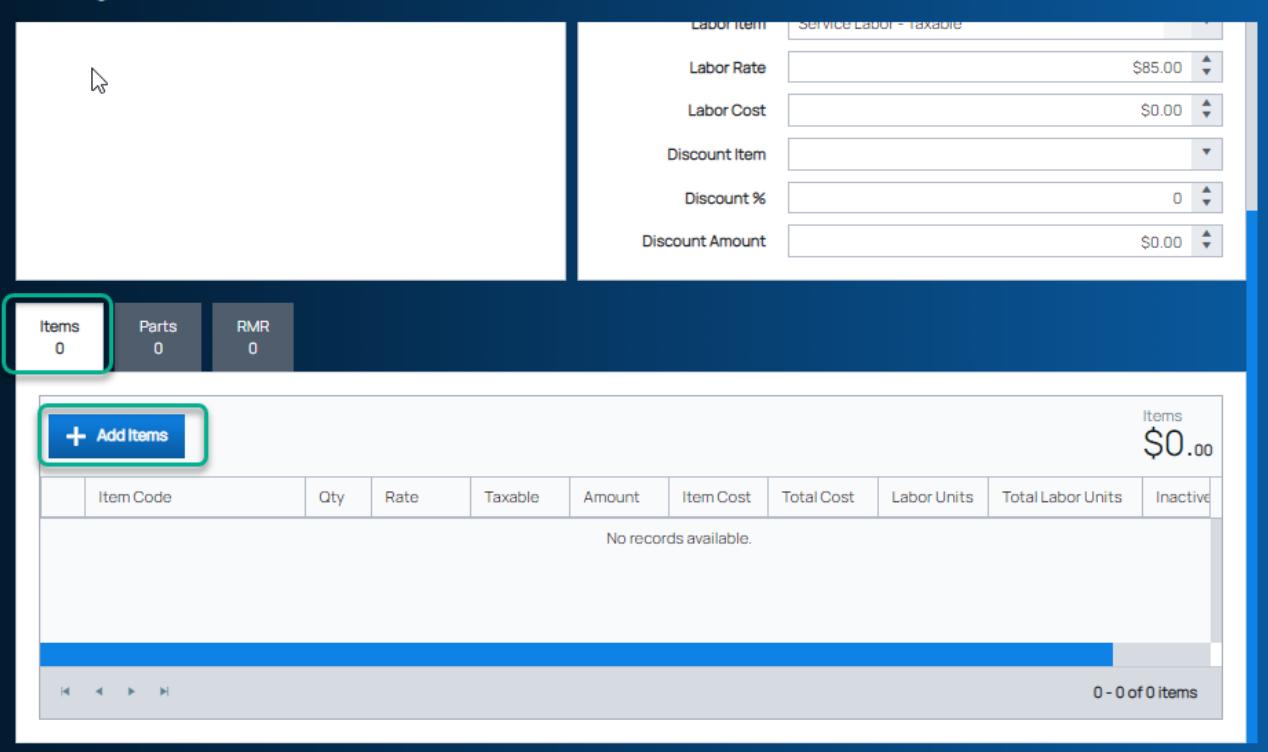
Res - Intrusion - \$399																								
Labor Total \$0.00	Discount \$0.00	Package Total \$0.00																						
Items Total \$0.00	Parts Total \$0.00	RMR Total \$0.00																						
Items 0	Parts 0	RMR 0																						
<table border="1"><tr><td>Items \$0.00</td></tr></table>			Items \$0.00																					
Items \$0.00																								
<table border="1"><tr><td>Item Code</td><td>It</td><td>Qty</td><td>Rate</td><td>Taxable</td><td>Amount</td><td>Item Cost</td><td>Total Cost</td><td>Labor Units</td><td>Total Labor Units</td><td>Inactive</td></tr><tr><td colspan="11">No records available.</td></tr></table>			Item Code	It	Qty	Rate	Taxable	Amount	Item Cost	Total Cost	Labor Units	Total Labor Units	Inactive	No records available.										
Item Code	It	Qty	Rate	Taxable	Amount	Item Cost	Total Cost	Labor Units	Total Labor Units	Inactive														
No records available.																								
0 - 0 of 0 items																								

Begin adding the elements contained within the package.

Adding Items to the Package

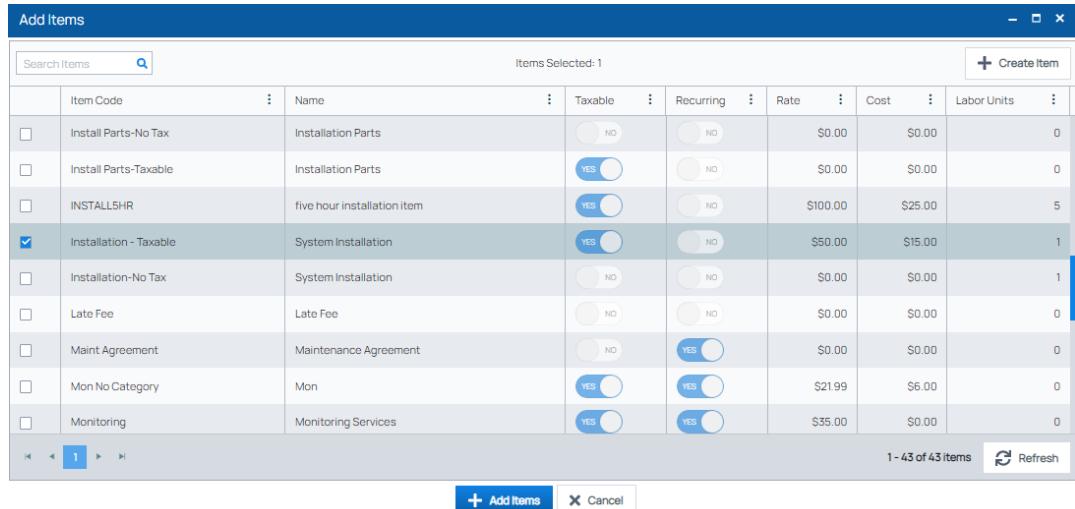
Click on the **Items** tab, and then click the **Add Items** button.

Packages



The screenshot shows the 'Packages' screen. At the top right, there is a configuration panel with fields for Labor Item (set to 'Service Labor - Taxable'), Labor Rate (\$85.00), Labor Cost (\$0.00), Discount Item, Discount % (0), and Discount Amount (\$0.00). Below this, a summary bar shows 'Items 0', 'Parts 0', and 'RMR 0'. A large button labeled '+ Add Items' is highlighted with a green box. The main area is a grid titled 'Add Items' showing 0 items. The grid has columns for Item Code, Qty, Rate, Taxable, Amount, Item Cost, Total Cost, Labor Units, Total Labor Units, and Inactive. A message 'No records available.' is displayed. At the bottom, a status bar shows '0 - 0 of 0 items'.

The Add Items list opens. Locate one or more Items to include in the package by selecting the checkbox to the left of each desired item. When finished, click the **Add Items** button at the bottom of the list.



The screenshot shows the 'Add Items' dialog box. It has a search bar at the top left and a 'Create Item' button at the top right. The main area is a grid titled 'Items Selected: 1' showing 43 items. The grid columns are: Item Code, Name, Taxable, Recurring, Rate, Cost, and Labor Units. One item, 'Installation - Taxable', has a checked checkbox and is highlighted in light blue. At the bottom, there are navigation buttons (back, forward, 1, 43 of 43 items, refresh), a 'Add Items' button, and a 'Cancel' button.

The selected items appear in the grid area. To edit the quantity or rate, double-click on the row to open the item in edit mode.

Items	Parts	RMR							
1	0	0							
+ Add Items									
Items \$50.00									
Item Code	Qty	Rate	Taxable	Amount	Item Cost	Total Cost	Labor Units	Total Labor Units	Inactive
Installation - Taxable	1	\$50.00	<input checked="" type="checkbox"/>	\$50.00	\$15.00	\$15.00	1	1	<input type="radio"/>
1-1 of 1 items									

The Edit Item form opens. Make the necessary changes, and then click the **OK** button when finished.

Edit Item : Installation - Taxable

Item Description •	System Installation	
Taxable?	<input checked="" type="radio"/> YES	
Quantity •	1	▼ ▲
Rate •	<input type="button" value="▼"/>	Amount \$50.00
Item Cost	<input type="button" value="▼"/>	Total Cost \$15.00
Labor Units •	1	▼ ▲ Total Labor Units 1
<input checked="" type="button"/> OK <input type="button"/> Cancel		

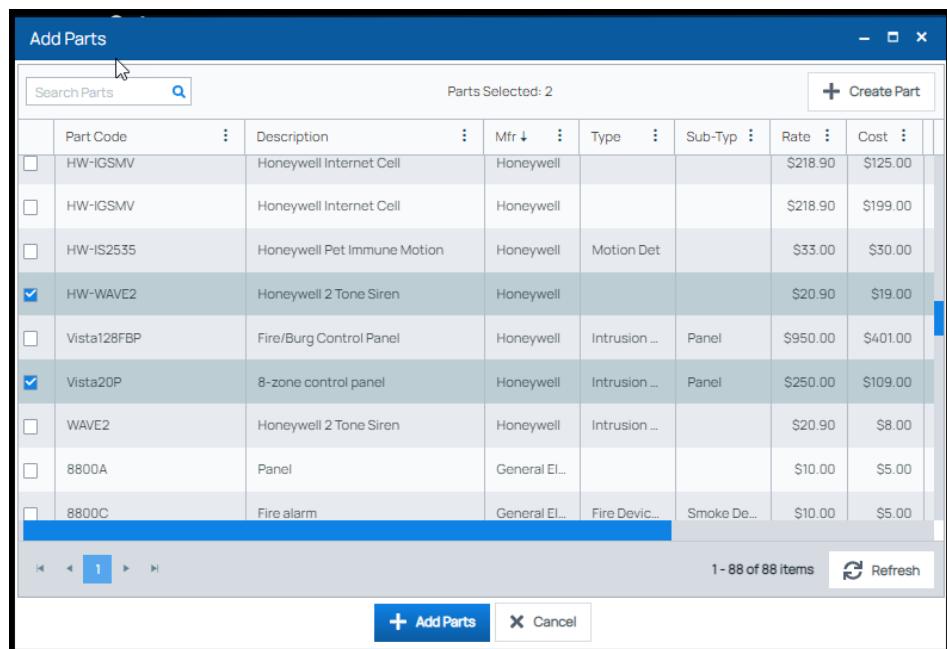
Adding Parts to the Package

Click on the Parts tab, and then click the **Add Parts** button.

Items	Parts	RMR								
1	0	0								
+ Add Parts										
Parts \$0.00										
Part Code	Qty	Rate	Taxable	Amount	Part Cost	Total Cost	Labor Units	Total Labor Units	Inactive	
No records available.										
0 - 0 of 0 items										

The Add Parts list opens. Locate one or more parts to include in the package by selecting the checkbox to the left of each desired part. When finished, click the **Add Parts** button at the bottom of the list.

Add Parts



Search Parts

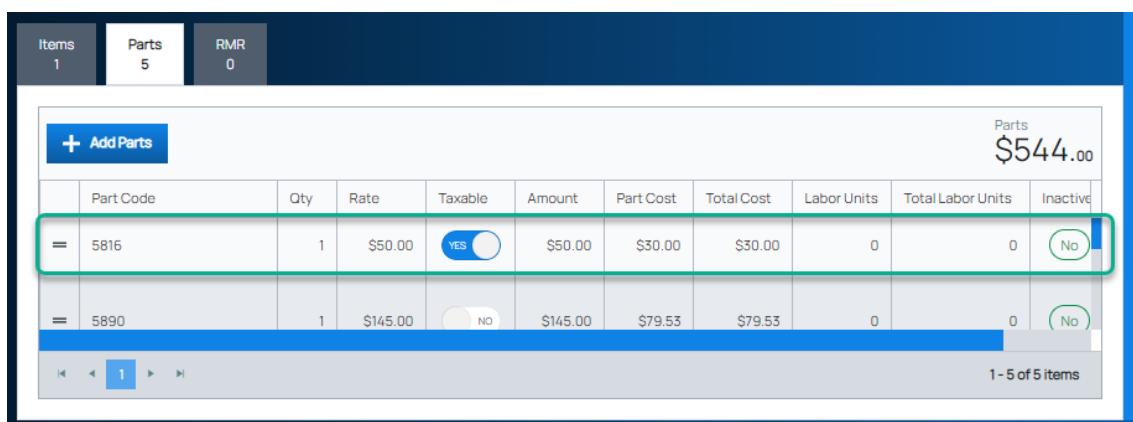
Parts Selected: 2

Part Code Description Mfr Type Sub-Typ Rate Cost

	HW-IGSMV	Honeywell Internet Cell	Honeywell			\$218.90	\$125.00
	HW-IGSMV	Honeywell Internet Cell	Honeywell			\$218.90	\$199.00
	HW-IS2535	Honeywell Pet Immune Motion	Honeywell	Motion Det		\$33.00	\$30.00
	HW-WAVE2	Honeywell 2 Tone Siren	Honeywell			\$20.90	\$19.00
	Vista128FBP	Fire/Burg Control Panel	Honeywell	Intrusion ...	Panel	\$950.00	\$401.00
	Vista20P	8-zone control panel	Honeywell	Intrusion ...	Panel	\$250.00	\$109.00
	WAVE2	Honeywell 2 Tone Siren	Honeywell	Intrusion ...		\$20.90	\$8.00
	8800A	Panel	General El...			\$10.00	\$5.00
	8800C	Fire alarm	General El...	Fire Devic...	Smoke De...	\$10.00	\$5.00

1 - 88 of 88 items

The selected parts appear in the grid area. To edit the quantity or rate, double-click on the row to open the part in edit mode.



Items 1 Parts 5 RMR 0

Parts \$544.00

Part Code Qty Rate Taxable Amount Part Cost Total Cost Labor Units Total Labor Units Inactive

= 5816	1	\$50.00	YES	\$50.00	\$30.00	\$30.00	0	0	No
= 5890	1	\$145.00	NO	\$145.00	\$79.53	\$79.53	0	0	No

1 - 5 of 5 items

The Edit Part form opens. Make the necessary changes, and then click the **OK** button when finished.

Note: If the package will be sold as a lump sum amount, and you do not want to charge the customer for each individual part, make certain to set the Rate field to zero.

Edit Part : 5816

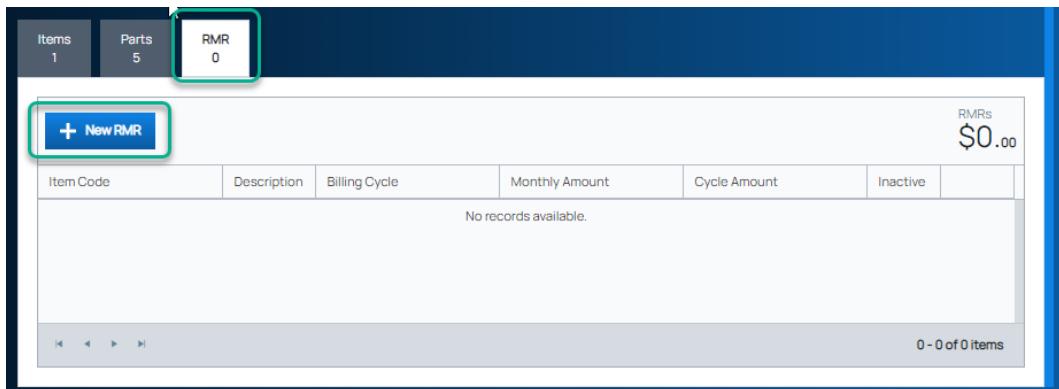
Part Description •

Taxable? YES

Quantity • <input type="text" value="1"/>	Amount <input type="text" value="\$50.00"/>
Rate • <input type="text" value="\$50.00"/>	Total Cost <input type="text" value="\$30.00"/>
Part Cost <input type="text" value="\$30.00"/>	Total Labor Units <input type="text" value="0"/>
Labor Units • <input type="text" value="0"/>	

Adding RMR to the Package

Click on the RMR tab, and then click the **New RMR** button.



The Add Sales Package RMR form opens. Fill in the form and then click the **Save** button at the bottom when finished. Repeat this process if more than one RMR is to be included in the package.

A screenshot of the 'Add Sales Package RMR' form. The form fields include: Item (Monitoring), Roll Up Item (empty), Description (Monitoring Services), Invoice In Arrears (NO), Do Not Prorate (NO), Use Cycle Amount (NO), Qty Based Billing (NO), Include Memo (NO), Memo (empty), Billing Cycle (Annual), Recurring Reason (New Sale), Category (Monitoring Services), Discount Item (empty), Monthly Amount (\$35.00), Cycle Amount (\$420.00), and Default Cost (\$0.00). At the bottom, there are 'Save' and 'Cancel' buttons.

When finished building the package, click the **Save** button located at the upper right of the page.

Packages

Res - Intrusion - \$399

Labor Total \$361.25	Discount \$0.00	Package Total \$955.25
Items Total \$50.00	Parts Total \$544.00	RMR Total \$35.00

Save Cancel

Red arrow pointing to the 'Save' button.

Form fields (right side):

- Name: Res - Intrusion - \$399
- Description: Panel, keypad, 2 motions, 2 door contacts (41/1000)
- Labor Item: Service Labor - Taxable
- Labor Rate: \$85.00
- Labor Cost: \$0.00
- Discount Item:
- Discount %: 0
- Discount Amount: \$0.00