

Add a Package

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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.

Packages					
<div><div><div><div></div></div><div>Add Package</div></div></div>					
Name	Description	Labor Rate	All Active		
Resi-\$199	Basic Intrusion with annual RMR and customer must sign-up for auto-pay.	\$15.00	<input checked="" type="checkbox"/>		Delete
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
<div><div><div><div></div></div><div>1</div></div><div>1 - 19 of 19 items</div><div> Refresh</div></div>					

The Add Package form opens.

Add Package

Name * Res - Intrusion - \$399

Description Panel, keypad, 2 motions, 2 door contacts 41/150

Labor Item Service Labor - Taxable

Labor Rate \$85.00

Labor Cost \$0.00

Discount Item

Discount % 0%

Discount Amount \$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

1 - 20 of 20 items Refresh

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

Packages

< 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

Name	Res - Intrusion - \$399	Labor Cost	\$0.00
Description	Panel, keypad, 2 motions, 2 door contacts	Discount Item	-
Labor Item	Service Labor	Discount	0%
Labor Rate	\$85.00	Discount Amount	\$0.00

Items
0

Parts
0

RMR
0

Items
\$0.00

Item Code	Qty	Rate	Taxable	Amount	Item Cost	Total Cost	Labor Units	Total Labor Units	Inactive
No records available.									

0 - 0 of 0 items Refresh

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

Items
0

Parts
0

RMR
0

+ Add Items

Items
\$0.00

Item Code	Qty	Rate	Taxable	Amount	Item Cost	Total Cost	Labor Units	Total Labor Units	Inactive
No records available.									

0 - 0 of 0 items

Labor Item

Service Labor - Taxable

Labor Rate

\$85.00

Labor Cost

\$0.00

Discount Item

Discount %

0

Discount Amount

\$0.00

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.

Add Items

Search Items

Items Selected: 1

+ Create Item

	Item Code	Name	Taxable	Recurring	Rate	Cost	Labor Units
<input type="checkbox"/>	Install Parts-No Tax	Installation Parts	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	Install Parts-Taxable	Installation Parts	<input checked="" type="radio"/> YES	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	INSTALL5HR	five hour installation item	<input checked="" type="radio"/> YES	<input type="radio"/> NO	\$100.00	\$25.00	5
<input checked="" type="checkbox"/>	Installation - Taxable	System Installation	<input checked="" type="radio"/> YES	<input type="radio"/> NO	\$50.00	\$15.00	1
<input type="checkbox"/>	Installation-No Tax	System Installation	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00	1
<input type="checkbox"/>	Late Fee	Late Fee	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	Maint Agreement	Maintenance Agreement	<input type="radio"/> NO	<input checked="" type="radio"/> YES	\$0.00	\$0.00	0
<input type="checkbox"/>	Mon No Category	Mon	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	\$21.99	\$6.00	0
<input type="checkbox"/>	Monitoring	Monitoring Services	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	\$35.00	\$0.00	0

1

1 - 43 of 43 items

Refresh

+ Add Items

X Cancel

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.

Item Code	Qty	Rate	Taxable	Amount	Item Cost	Total Cost	Labor Units	Total Labor Units	Inactive
Installation - Taxable	1	\$50.00	YES	\$50.00	\$15.00	\$15.00	1	1	No

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

Item Description: System Installation

Taxable? YES

Quantity: 1

Rate:

Amount: \$50.00

Item Cost:

Total Cost: \$15.00

Labor Units: 1

Total Labor Units: 1

OK Cancel

Adding Parts to the Package

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

Part Code	Qty	Rate	Taxable	Amount	Part Cost	Total Cost	Labor Units	Total Labor Units	Inactive
No records available.									

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 + Create Part

	Part Code	Description	Mfr	Type	Sub-Typ	Rate	Cost
<input type="checkbox"/>	HW-IGSMV	Honeywell Internet Cell	Honeywell			\$218.90	\$125.00
<input type="checkbox"/>	HW-IGSMV	Honeywell Internet Cell	Honeywell			\$218.90	\$199.00
<input type="checkbox"/>	HW-IS2535	Honeywell Pet Immune Motion	Honeywell	Motion Det		\$33.00	\$30.00
<input checked="" type="checkbox"/>	HW-WAVE2	Honeywell 2 Tone Siren	Honeywell			\$20.90	\$19.00
<input type="checkbox"/>	Vista128FBP	Fire/Burg Control Panel	Honeywell	Intrusion ...	Panel	\$950.00	\$401.00
<input checked="" type="checkbox"/>	Vista20P	8-zone control panel	Honeywell	Intrusion ...	Panel	\$250.00	\$109.00
<input type="checkbox"/>	WAVE2	Honeywell 2 Tone Siren	Honeywell	Intrusion ...		\$20.90	\$8.00
<input type="checkbox"/>	8800A	Panel	General EL...			\$10.00	\$5.00
<input type="checkbox"/>	8800C	Fire alarm	General EL...	Fire Devic...	Smoke De...	\$10.00	\$5.00

1 - 88 of 88 items Refresh

+ Add Parts X Cancel

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.

Edit Part

Items 1 Parts 5 RMR 0 Parts \$544.00

+ Add Parts

	Part Code	Qty	Rate	Taxable	Amount	Part Cost	Total Cost	Labor Units	Total Labor Units	Inactive
=	5816	1	\$50.00	<input checked="" type="checkbox"/>	\$50.00	\$30.00	\$30.00	0	0	<input checked="" type="checkbox"/>
=	5890	1	\$145.00	<input type="checkbox"/>	\$145.00	\$79.53	\$79.53	0	0	<input checked="" type="checkbox"/>

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? ☒

Quantity

Rate Amount \$50.00

Part Cost Total Cost \$30.00

Labor Units Total Labor Units 0

✓ OK X Cancel

Adding RMR to the Package

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

The screenshot shows a software interface with three tabs at the top: 'Items' (1), 'Parts' (5), and 'RMR' (0). The 'RMR' tab is selected and highlighted with a green box. Below the tabs, there is a '+ New RMR' button, also highlighted with a green box. To the right of the button, it says 'RMRs \$0.00'. Below this is a table with the following columns: 'Item Code', 'Description', 'Billing Cycle', 'Monthly Amount', 'Cycle Amount', 'Inactive', and an empty column. The table is currently empty, with the text 'No records available.' in the center. At the bottom right of the table area, it says '0 - 0 of 0 items'.

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.

The screenshot shows a form titled 'Add Sales Package RMR'. The form contains the following fields and options:

- Item**: Monitoring (dropdown)
- Roll Up Item**: (dropdown)
- Description**: Monitoring Services (text area, 19/500 characters)
- Invoice In Arrears**: NO (radio button)
- Do Not Prorate**: NO (radio button)
- Use Cycle Amount**: NO (radio button)
- Qty Based Billing**: NO (radio button)
- Include Memo**: NO (radio button)
- Memo**: (text area, 0/500 characters)
- Billing Cycle**: Annual (dropdown)
- Recurring Reason**: New Sale (dropdown)
- Category**: Monitoring Services (dropdown)
- Discount Item**: (dropdown)
- Monthly Amount**: \$35.00 (text input)
- Cycle Amount**: \$420.00 (text input)
- Default Cost**: \$0.00 (text input)

At the bottom of the form, there are two buttons: 'Save' (with a checkmark icon) and 'Cancel' (with an X icon).

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

Packages

< Res - Intrusion - \$399



X Cancel

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

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