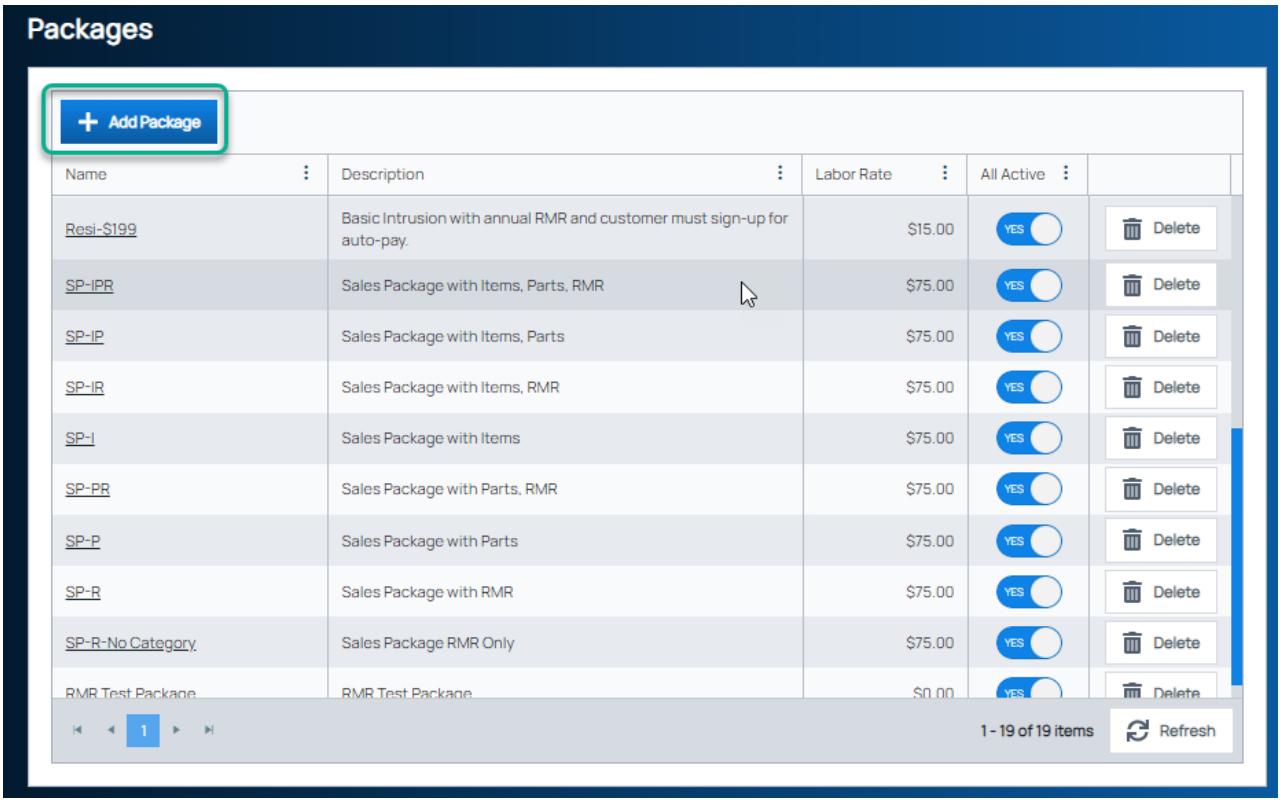
Add a Package

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

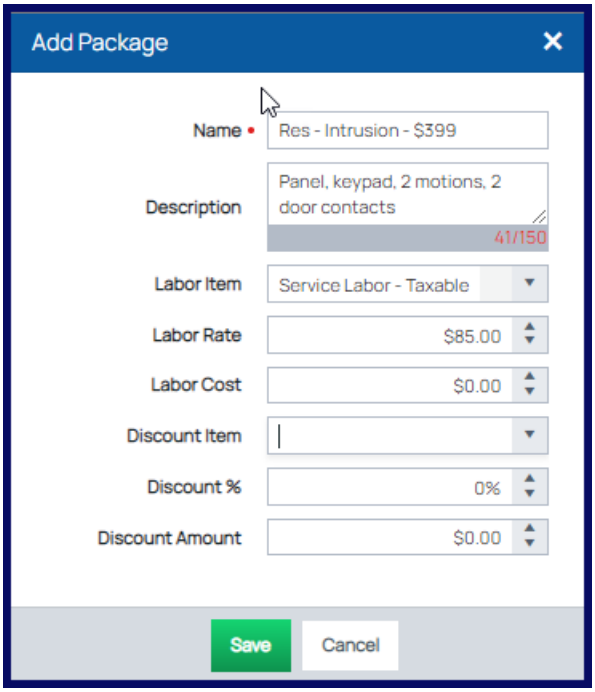
When creating a new package, first enter a description and select optional labor and discount codes and values. Once the package record is created, build the package by selecting items, parts, and RMR.

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 Add Package form opens.



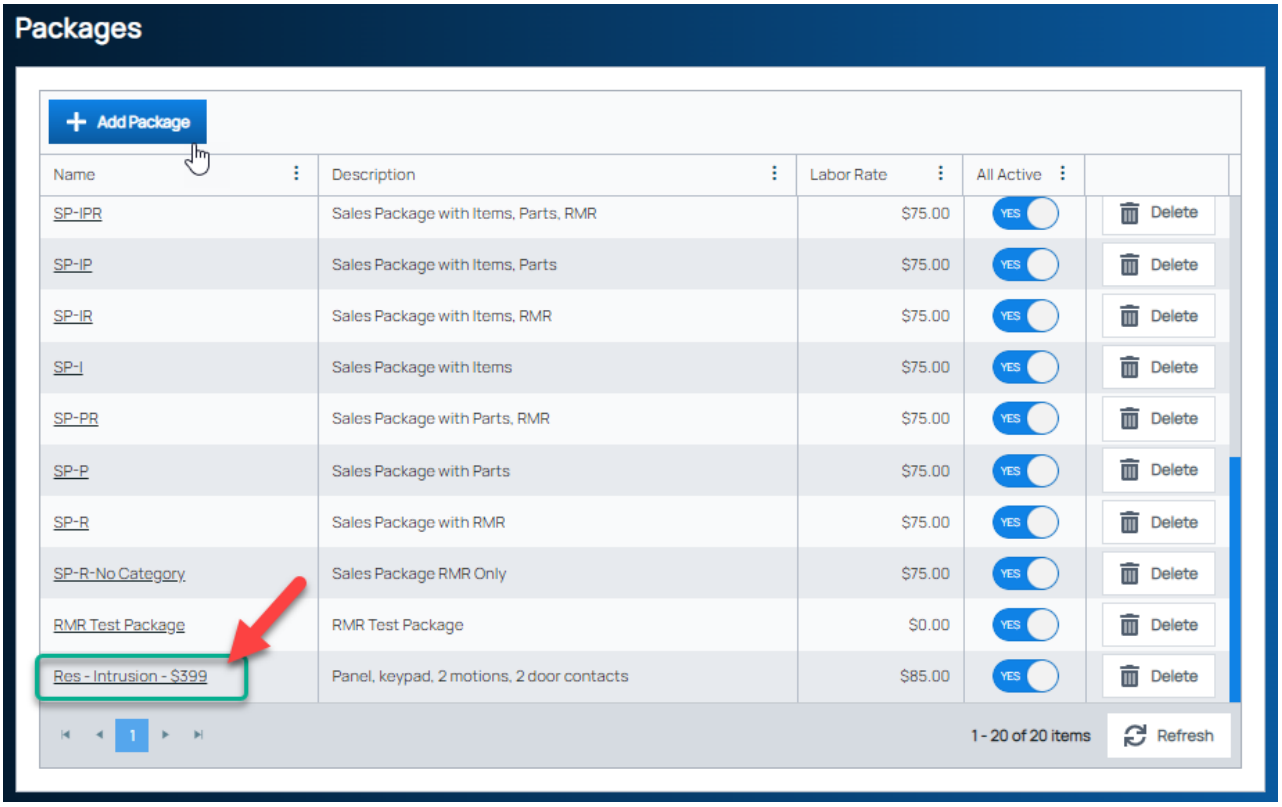
Data Entry Fields

Data entry fields preceded by an asterisk are required.

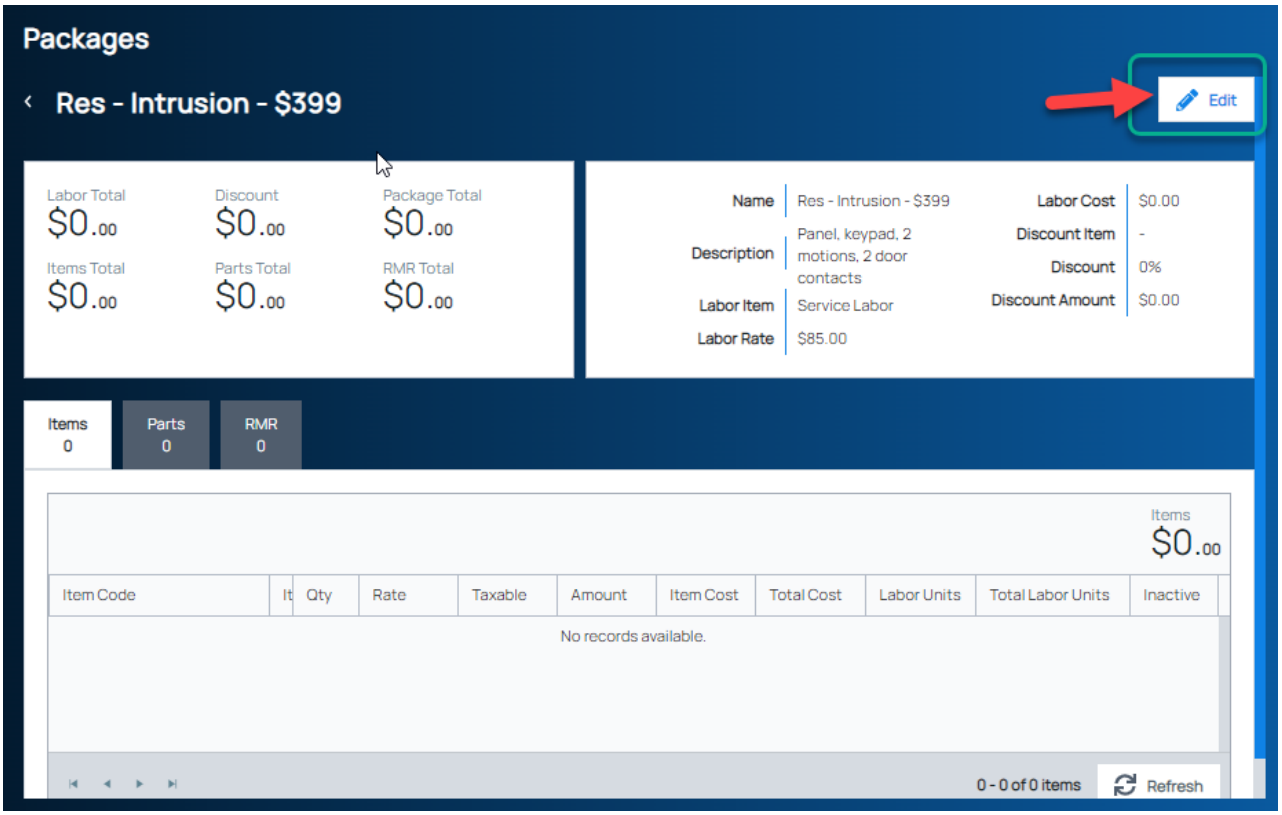
- *__Name__: Type in a short description for the package. Maximum of 25 characters.
- *__Description__: Type in a long description for the package. You may want to enter what is included in the package. Maximum of 150 characters.
- __Labor Item__: If you want to have a line item appear for labor, select 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.



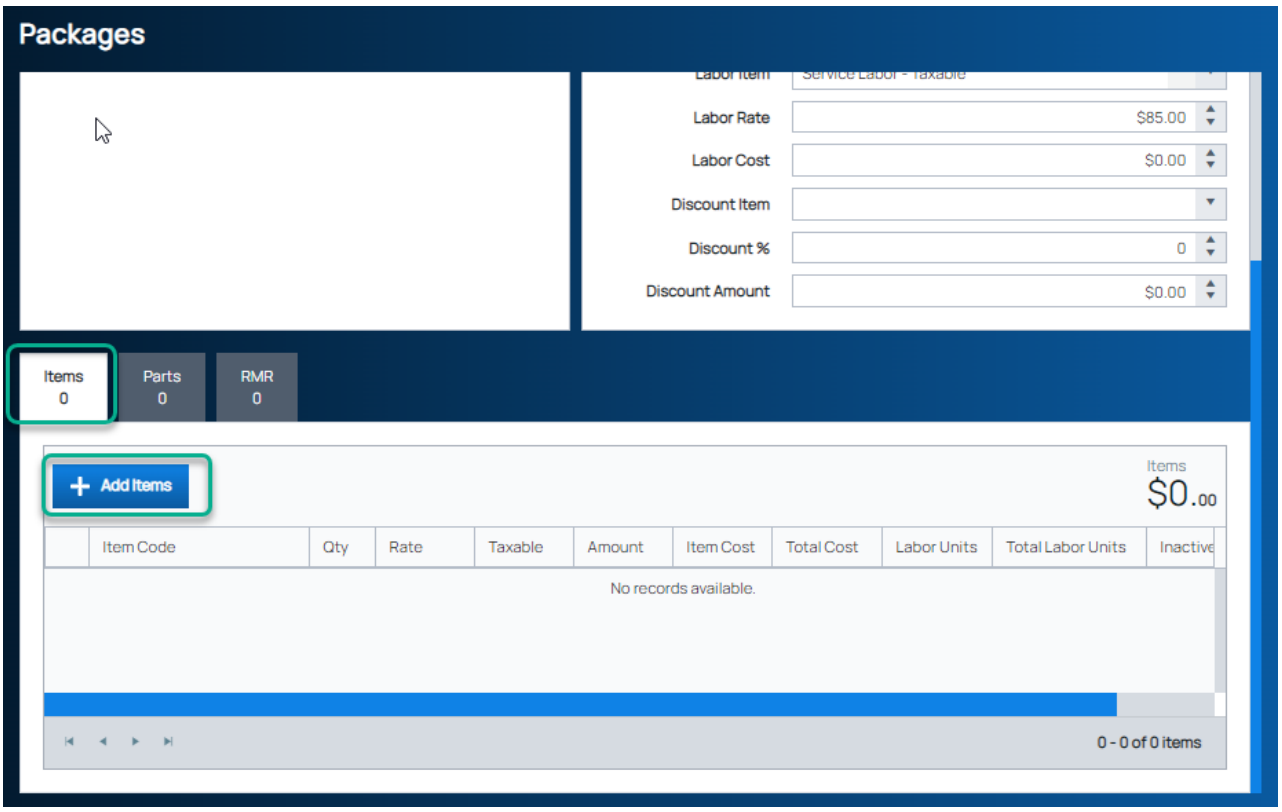
The package record opens. Click the **Edit** button at the upper right of the page.



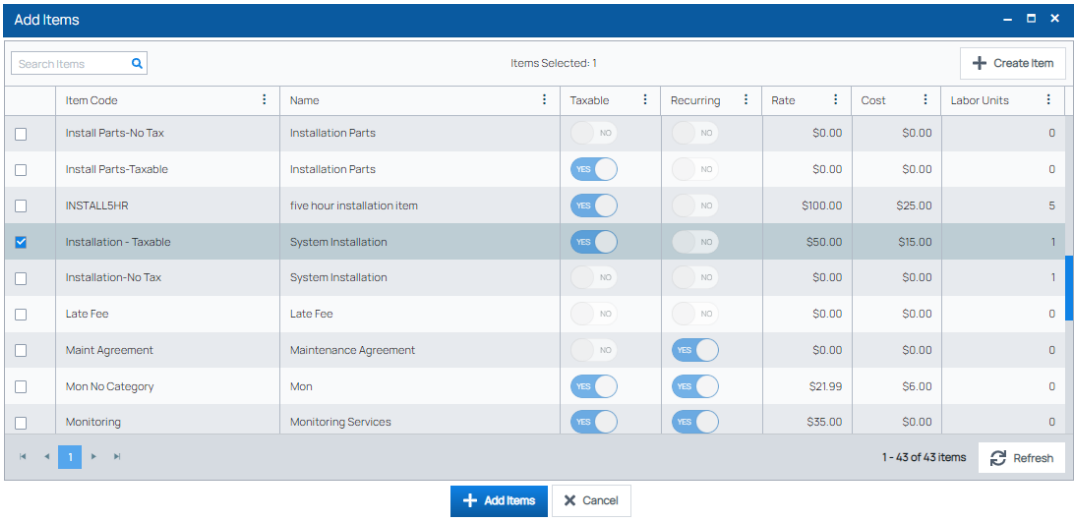
Begin adding the elements contained within the package.

Adding Items to the Package

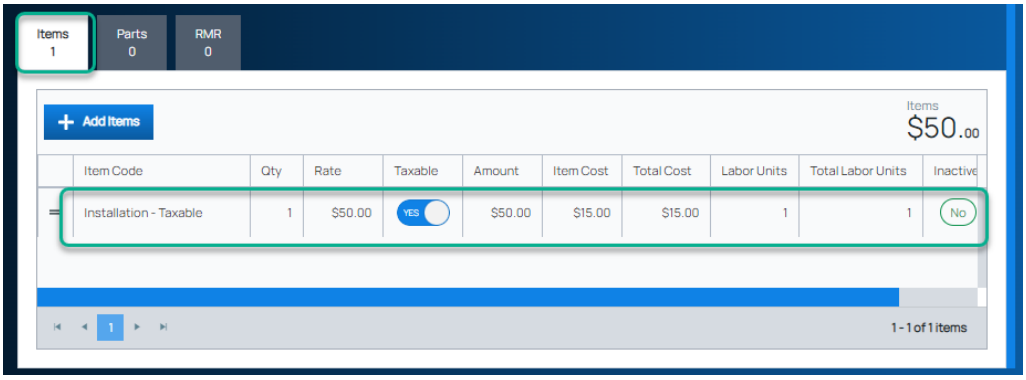
Click on the Items tab, and then click the **Add Items** button.



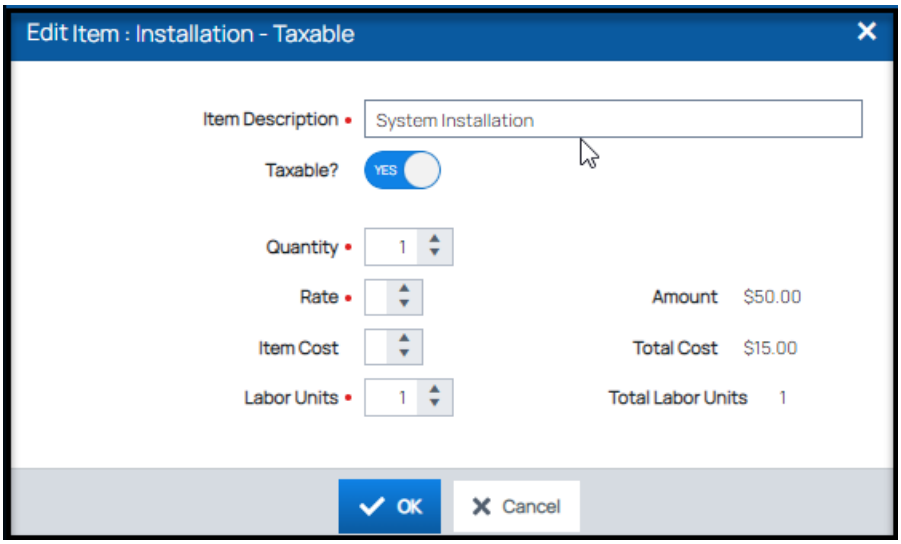
The Add Items list opens. Locate one or more Items to include in the package by selecting the checkbox to the left of each desired item. When finished, click the **Add Items** button at the bottom of the list.



The 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.

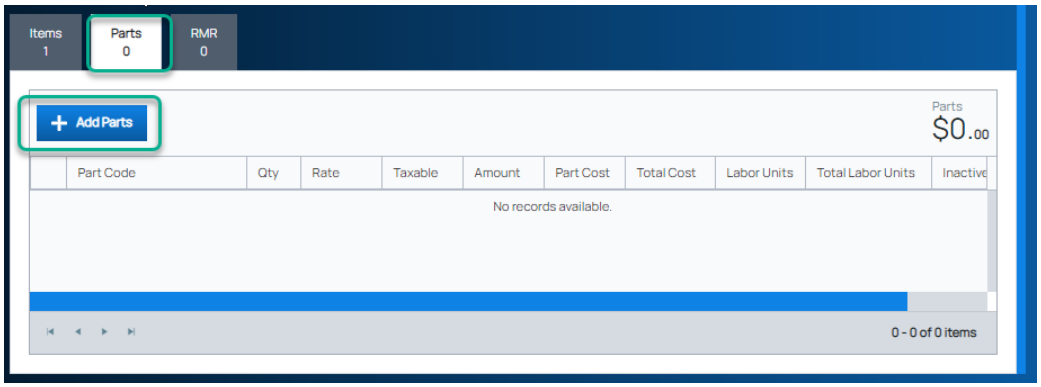


The Edit Item form opens. Make the necessary changes, and then click the **OK** button when finished.

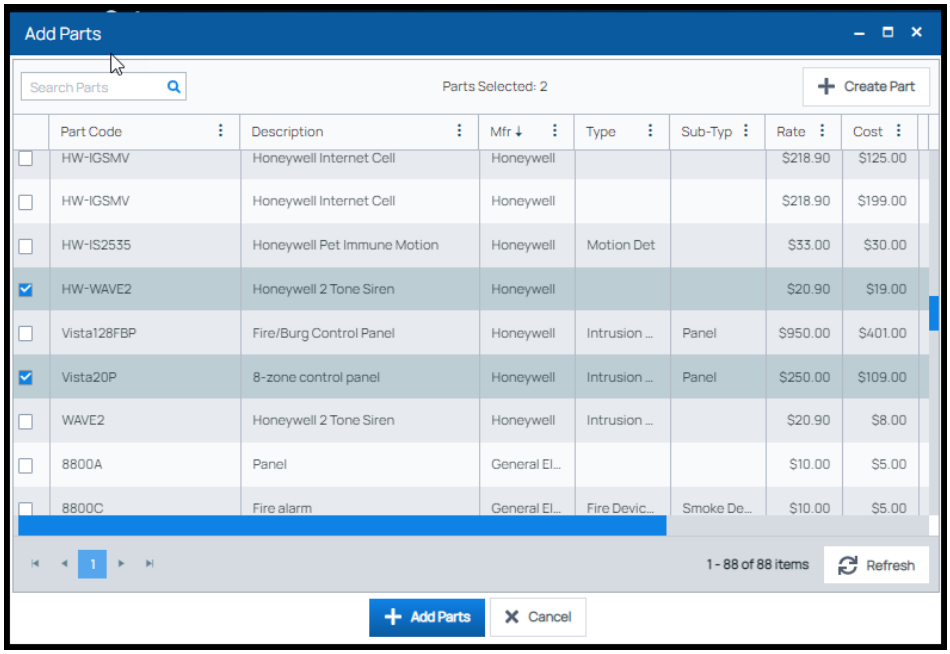


Adding Parts to the Package

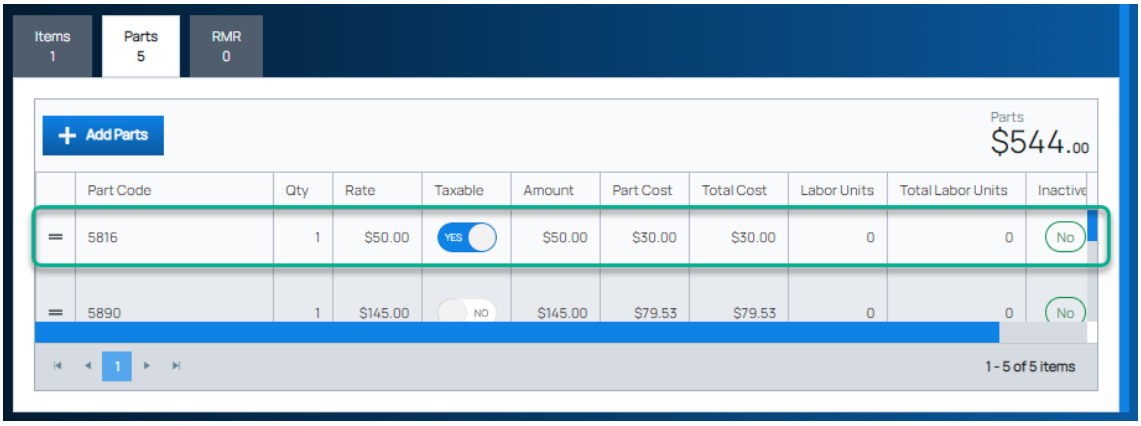
Click on the Parts tab, and then click the **Add Parts** button.



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.

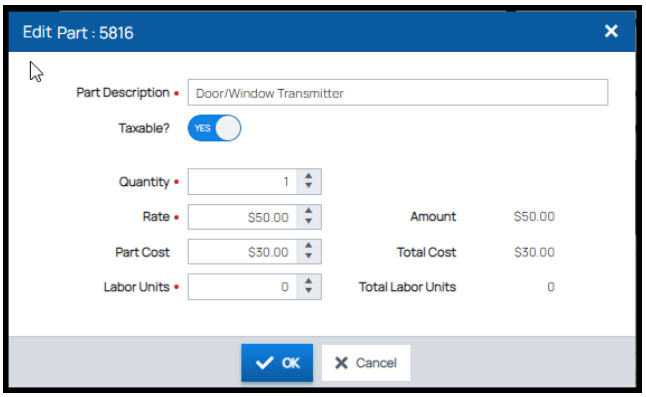


The selected parts appear in the grid area. To edit the quantity or rate, double-click on the row to open the part in edit mode.



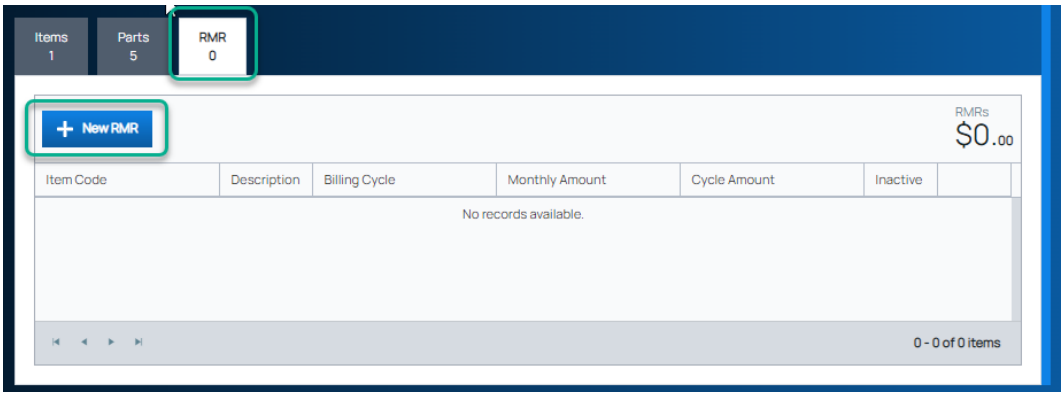
The Edit Part form opens. Make the necessary changes, and then click the **OK** button when finished.

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.

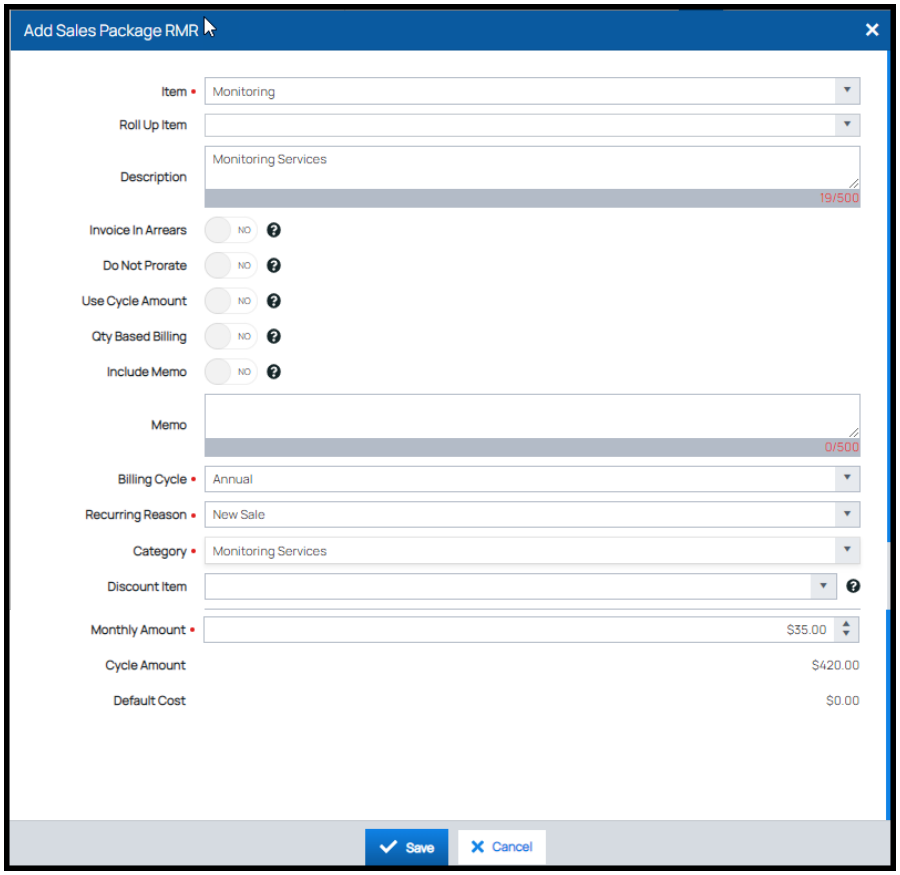


Adding RMR to the Package

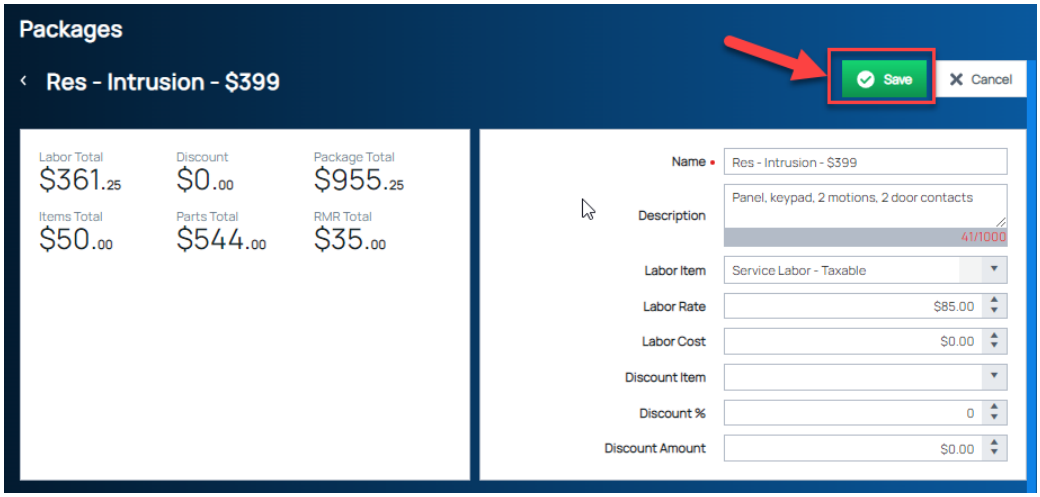
Click on the RMR tab, and then click the **New RMR** button.



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.



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


Packages
Res - Intrusion - $399
Save
Cancel
Labor Total
$361.25
Discount
$0.00
Package Total
$955.25
Items Total
$50.00
Parts Total
$544.00
RMR Total
$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