

# Add a Package

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When creating a new Package, you will first enter a description and select optional labor and discount codes and values. Once the Package record has been created, build the package by selecting items, parts, and recurring.

To add a new Package, from the main menu, arrive at the Package setup with this path: Setup > Proposals > Packages.

The Packages list will be displayed. Click on the Add Package button at the upper left of the page.

Name	Description	Labor Rate	All Active	
<a href="#">Resi-\$199</a>	Basic Intrusion with annual RMR and customer must sign-up for auto-pay.	\$15.00	YES <input type="checkbox"/>	Delete
<a href="#">SP-IPR</a>	Sales Package with Items, Parts, RMR	\$75.00	YES <input type="checkbox"/>	Delete
<a href="#">SP-IP</a>	Sales Package with Items, Parts	\$75.00	YES <input type="checkbox"/>	Delete
<a href="#">SP-IR</a>	Sales Package with Items, RMR	\$75.00	YES <input type="checkbox"/>	Delete
<a href="#">SP-I</a>	Sales Package with Items	\$75.00	YES <input type="checkbox"/>	Delete
<a href="#">SP-PR</a>	Sales Package with Parts, RMR	\$75.00	YES <input type="checkbox"/>	Delete
<a href="#">SP-P</a>	Sales Package with Parts	\$75.00	YES <input type="checkbox"/>	Delete
<a href="#">SP-R</a>	Sales Package with RMR	\$75.00	YES <input type="checkbox"/>	Delete
<a href="#">SP-R-No Category</a>	Sales Package RMR Only	\$75.00	YES <input type="checkbox"/>	Delete
<a href="#">RMR_Test Package</a>	RMR_Test Package	\$0.00	YES <input type="checkbox"/>	Delete

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The Add Package form will be displayed.

## 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, you may 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 may 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 may either enter a percentage value or a flat amount in this field.

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

You will be returned to the Packages 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	
<a href="#">SP-IPR</a>	Sales Package with Items, Parts, RMR	\$75.00	<input checked="" type="checkbox"/>	Delete
<a href="#">SP-IP</a>	Sales Package with Items, Parts	\$75.00	<input checked="" type="checkbox"/>	Delete
<a href="#">SP-IR</a>	Sales Package with Items, RMR	\$75.00	<input checked="" type="checkbox"/>	Delete
<a href="#">SP-I</a>	Sales Package with Items	\$75.00	<input checked="" type="checkbox"/>	Delete
<a href="#">SP-PR</a>	Sales Package with Parts, RMR	\$75.00	<input checked="" type="checkbox"/>	Delete
<a href="#">SP-P</a>	Sales Package with Parts	\$75.00	<input checked="" type="checkbox"/>	Delete
<a href="#">SP-R</a>	Sales Package with RMR	\$75.00	<input checked="" type="checkbox"/>	Delete
<a href="#">SP-R-No Category</a>	Sales Package RMR Only	\$75.00	<input checked="" type="checkbox"/>	Delete
<a href="#">RMR Test Package</a>	RMR Test Package	\$0.00	<input checked="" type="checkbox"/>	Delete
<a href="#">Res - Intrusion - \$399</a>	Panel, keypad, 2 motions, 2 door contacts	\$85.00	<input checked="" type="checkbox"/>	Delete

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The Package record will be displayed. Click on the Edit button at the upper right of the page.

## Packages

### < Res - Intrusion - \$399

[Edit](#)

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

Items: 0, Parts: 0, RMR: 0

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 [Refresh](#)

You may now begin adding the elements contained within the package.

### Adding Items to the Package

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

## Packages

Labor Item: Service Labor - Taxable

Labor Rate: \$85.00

Labor Cost: \$0.00

Discount Item: [Dropdown]

Discount %: 0

Discount Amount: \$0.00

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

The Add Items list will be displayed. Locate one or more Items to include in the package by checking the box to the left of each desired Item. When finished, click on the Add Items button at the bottom of the list.

Add Items
[-] [x]

Items Selected: 1
+ Create Item

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

1 - 43 of 43 items
Refresh

+ Add Items
X Cancel

The selected Items will 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 will be displayed. Make the necessary changes, and then click on the OK button when finished.

Item Description: System Installation

Taxable? YES

Quantity: 1

Rate: \$50.00

Item Cost: \$15.00

Labor Units: 1

Amount: \$50.00

Total Cost: \$15.00

Total Labor Units: 1

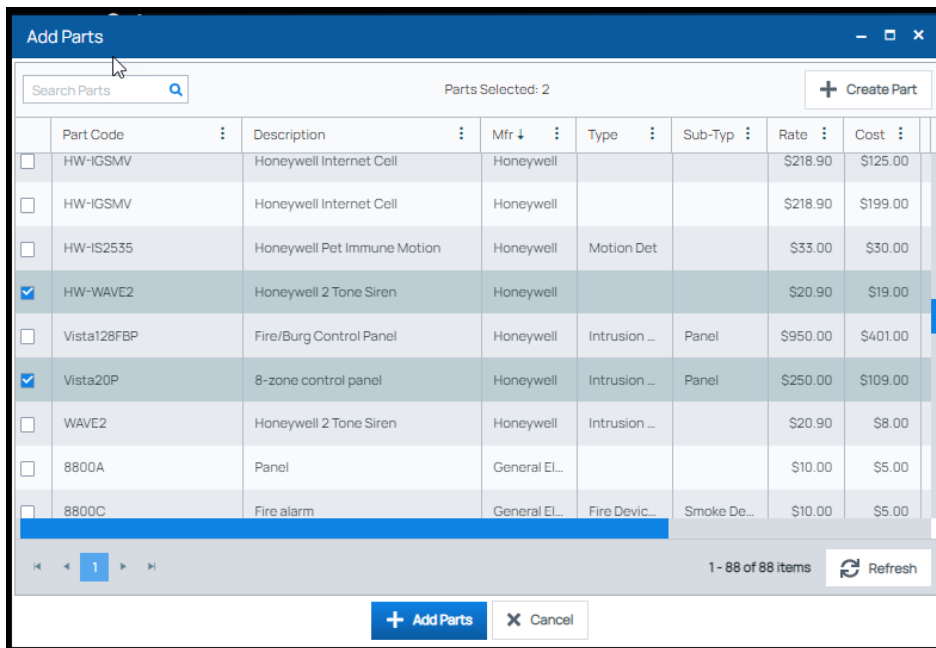
OK Cancel

### Adding Parts to the Package

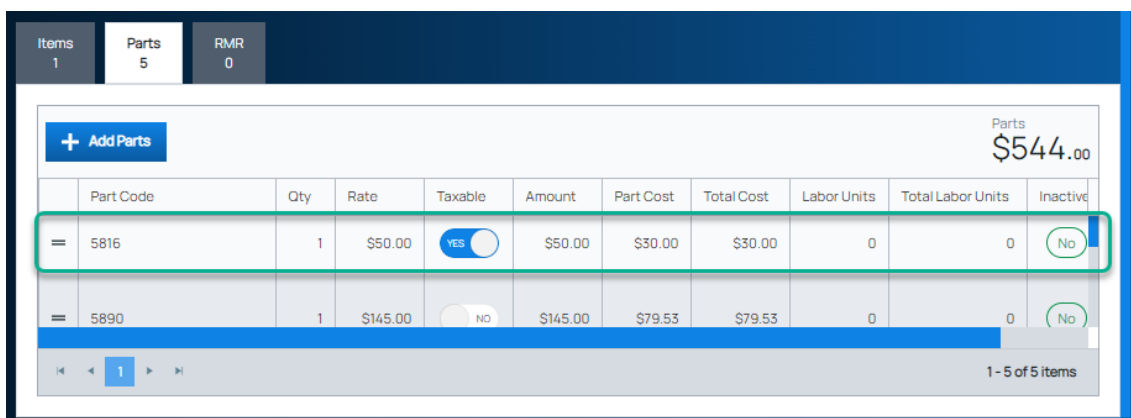
Click on the Parts tab, and then click on the Add Parts button.

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

The Add Parts list will be displayed. Locate one or more parts to include in the package by checking the box to the left of each desired Part. When finished, click on the Add Parts button at the bottom of the list.

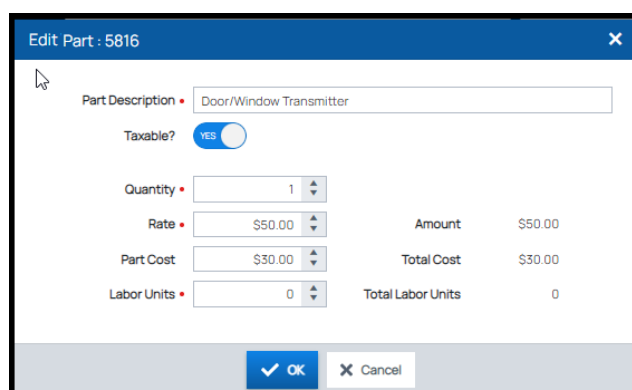


The selected Parts will appear in the grid area. To edit the quantity or rate, double-click on the row to open the Part in edit mode.



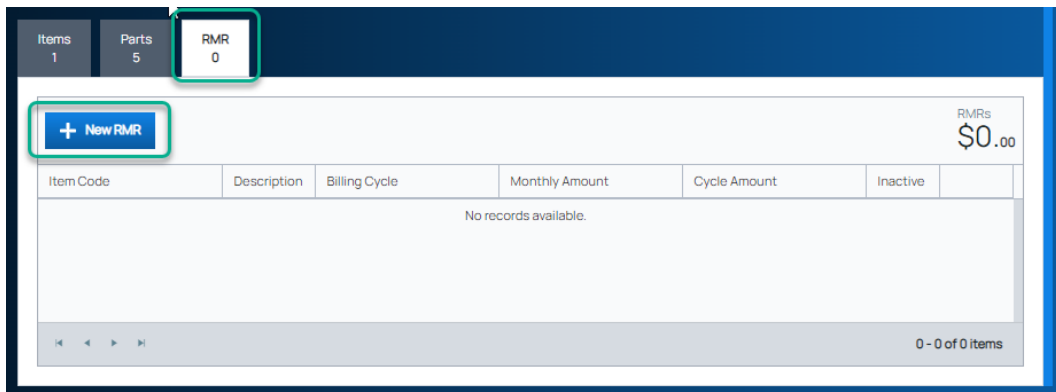
The Edit Part form will be displayed. Make the necessary changes, and then click on the OK button when finished.

*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 on the New RMR button.



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

The 'Add Sales Package RMR' form is shown with the following fields and values:

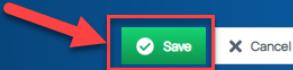
- Item: Monitoring
- Roll Up Item: (empty)
- Description: Monitoring Services (19/500 characters)
- Invoice In Arrears: NO
- Do Not Prorate: NO
- Use Cycle Amount: NO
- Qty Based Billing: NO
- Include Memo: NO
- Memo: (empty) (0/500 characters)
- Billing Cycle: Annual
- Recurring Reason: New Sale
- Category: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

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

When finished building the Package, click on the Save button located at the upper right of the page.

Packages

< Res - Intrusion - \$399



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