

Packages Overview

Last Modified on 01/20/2026 4:05 pm EST

Packages are used to create a grouping of items, parts, and RMR that are sold together on a regular basis. A package may contain items only, parts only, RMR only, or any combination of the three elements.

You can select a packages when creating a proposal, a work order, or a manual customer invoice. Once you select a package, you can add, remove, or modify any of the elements contained within the package.

Sales Package field on a proposal

The screenshot shows the 'Proposal #3146' form. On the left, a summary box lists: Items Total \$0.00, Parts Total \$0.00, Tax Total \$0.00, Proposal Total \$0.00, and RMR Total \$0.00. The main form area is divided into three columns. The middle column contains fields for Status (New), PO Number, Proposal Date (05/10/2022), Contact, Phone ((734) 258-4646), Email (carolynj@boldgroup.com), Follow Up (05/10/2022 14:20), Est Closing (05/10/2022), Est Closing % (3%), and Source (Social Media). The right column contains fields for Site (Emily's Tea Shoppe - 3719-03), System, System Type (Fire Alarm), Sales Package (highlighted with a red arrow), Sales Tax (MI - 6%), Term (Due on Receipt), Service Level (SVC T&M RES), Salesperson (Dan Brown), Delivery Method (Print), and a Brief Description field. At the top right are 'Save' and 'Cancel' buttons. A 'Hide Details' button is located below the proposal number.

Sales Package field on a work order

The screenshot shows the 'Work Order 2617' form. On the left, a summary box lists: Service Fee \$85.00, Labor \$0.00, Parts \$1,369.00, and Total \$2,814.54. The main form area is divided into three columns. The middle column contains fields for Status (New), Site (#3719-01 Emily Wood - 45722), System (Burglar Alarm - 9173-01), Tax (MI - 6.0000%), Type (Intrusion Installation-Residential), Requested By (Emily Wood), Phone ((734) 258-4646), Email (emilylwood@gmail.com), PO Number (Purchase Order), and Work Order Date (4/24/2022). The right column contains fields for Technician, Salesperson (Dan Brown), Sales Package (highlighted with a red arrow), Service Level (Time and Material Residential), and Warehouse. At the top right are 'Save', 'Cancel', and 'Void' buttons.

Sales Package field on an invoice

< New Manual Invoice

✓ Save

✉ Save and Deliver

✕ Cancel

Emily Wood #3719-01 Emily Wood - 45722 Chandler

Invoice Amount

\$0.00

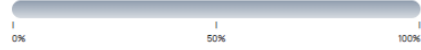
• 0 Payments = \$0.00

• 0 Credits = \$0.00

Balance Due

\$0.00

• 1 day past due



Site • #3719-01 Emily Wood

Category

PO Number

Invoice Date • 8/11/2022

Due Date 8/11/2022

Contact

Billing Address

Sales Tax • MI

Term • Due on Receipt

Salesperson • Kathy Ackerman

Delivery Method Email

Sales Package

Warehouse