

# Packages Overview

Last Modified on 08/15/2022 11:32 am EDT

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.

Packages are selectable when creating a Proposal, a Work Order, or a Manual Customer Invoice. Once a Package is selected, the user has the ability to remove or modify any of the elements contained within the Package. Users may add additional items to the default elements of the Package selected on the Proposal, Work Order, or Manual Customer Invoice.

## Sales Package field on a Proposal

The screenshot shows the 'Proposal #3146' form. On the left, there is a summary section with the following values: 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), and Delivery Method (Print). There is also a 'Brief Description' field at the bottom right.

## Sales Package field on a Work Order

The screenshot shows the 'Work Order 2617' form. On the left, there is a summary section with the following values: 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.

## Sales Package field on an Invoice

< New Manual Invoice

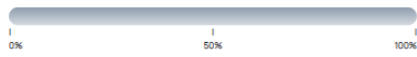
Save Save and Deliver Cancel

Emily Wood #3719-01 Emily Wood - 45722 Chandler

Invoice Amount  
**\$0.00**

Balance Due  
**\$0.00**

- 0 Payments = \$0.00
- 0 Credits = \$0.00
- 1 day past due



0% 50% 100%

Site	#3719-01 Emily Wood	Sales Tax	MI
Category		Term	Due on Receipt
PO Number		Salesperson	Kathy Ackerman
Invoice Date	8/11/2022	Delivery Method	Email
Due Date	8/11/2022	Sales Package	
Contact		Warehouse	
Billing Address			



Sales Package