




*Summary: Overview of the functionality to bundle multiple products into a single line item Package on an e360 Proposal. Key functionality, terms, and best practices will be reviewed.*

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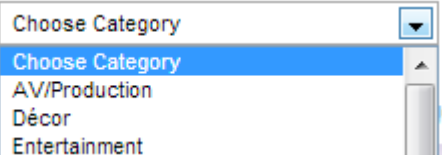
### Create a New Package

1. Go to **Step 3** of an existing e360 Proposal or Invoice.
2. Add all the items to your event that you would like to include in your package.
3. Scroll down to **Items for Your Proposal**
4. Click the checkbox  in the far right column next to the products you want in your package.
5. Click  to open the **Create Your Package** window.

*Tips: After you create a package, you can edit it at any time by clicking on the Package  icon next to the line item on Step 3. You can delete an entire package at any time by clicking  next to the line item on Step 3. Deleting a package also removes all of the items in the package from the proposal.*

### Name and Categorize your Package



In the Create or Edit Your Package window:

1. **Package Name:**
2. **Category:** 

*Tips: You can edit the main package photo and description on Step 4, Update Descriptions.*

### Edit products in the package


In the Create or Edit Your Package window:

1. Click  to open the Edit Line Item Details window
2. Make your changes to your item costs, using the tabs to navigate.
3. Click 

*Tips: You can edit the product photos, descriptions and hyperlinks on Step 4, Update Descriptions*

### Remove products from a package

In the Create or Edit Your Package window:

1. Click **Remove** next to the item.
2. The product will be removed from the package and returned to the list of **Items for Your Proposal** in Step 3.
3. If you need to completely delete the product from the proposal, click  next to the item on the list of **Items for Your Proposal** in Step 3.

## Add products to the package

In the Create or Edit Your Package window:

1. Click the down arrow to reveal the section:



Select additional items for this package

2. Click **Add Item** next to the products you want to add to the package.

*Tips: You can ONLY add items to a package that are already added to your proposal. If you need to add a completely new item to the proposal, close the Create Your Package window and go back to Step 3, Select Your Products.*

## Set the Min and Max number people for the package

In the Create or Edit Your Package window:

1. Click the down arrow to reveal the section:



Set the price per person for this package

2. Enter your values in the fields:

**Minimum number of people:**

**Maximum number of people:**

*Tips: After you enter a Min/Max number of people, you will get a warning message if you try to change the Pkg Qty to a number that is outside those parameters.*

*Tips: The **Minimum number of people** value will be used to calculate your **Price Per Person**.*

## Set your Rounding Method for the package pricing

In the Create or Edit Your Package window:

1. Click the down arrow to reveal the section:



Set the price per person for this package

2. Choose a value from the list:

**Cost rounding method:**

- Standard rounding
- Round to the nearest half dollar
- Round to the nearest dollar

*Tips: Standard rounding rounds to the nearest 5 or 10 cent increment.*

## Change your Margin and/or Price Per Person for the package

In the Create or Edit Your Package window:

1. Click the down arrow to reveal the section:

Set the price per person for this package

2. Edit the fields:

<b>Total Cost</b>		<b>Margin</b>		<b>Min. Persons</b>		<b>Price Per Person</b>
\$9,300.00	×		÷		=	

3. When you change the Margin, the Price Per Person updates
4. When you change the Price Per Person, the Margin updates

*Tips: As you add, remove or change products in your package, the Margin automatically adjusts.*


### Set the Taxes for the package

In the Create or Edit Your Package window:

1. Click the down arrow to reveal the section:

Set the price per person for this package

2. Click the button **Set Taxes for this Package**
3. Check the box next to the Taxes you want to apply
4. Adjust the % rate, if needed
5. Click **Save Changes**

*Tips: Your package tax rates are defaulted to the general tax rates you set in Step 2. You can also set taxes for individual products by clicking the pencil icon  next to the line item.*

### Change the package quantity (number of people)

In the Create or Edit Your Package window:

1. Click the down arrow to reveal the section:

Set the price per person for this package

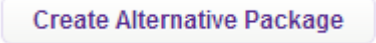
2. Change the number in the the Pkg Qty field

<b>Pkg Qty</b>		<b>Per Person Price</b>		<b>Pkg Subtotal</b>		<b>Total Taxes</b>		<b>Total Fees</b>		<b>Package Total</b>
	×		=		+	\$0.00	+	\$0.00	=	

3. The fields to the right will automatically update to show your new totals.

### Duplicate the package to create an alternate option

In the Create or Edit Your Package window:

1. Click 
2. Enter a Name and Category for your Alternate Package
3. Change any other items you wish
4. Click **Save**

*Tip: Alternative Packages are very handy for showing several different options to your client. When you create an Alternate Package, the original package is automatically saved. Only the original package (“first option”) will be included in your proposal pricing. Deleting the “first option” will also delete all alternative (ALT) packages.*

## Other Notes on Packages

### **Hiding Items to Clients within a Packages**

You have the option to add items that you previously checked **not to be shown to the client** on the **Client Pricing** side to your package in Eved.

#### **Client Pricing**

Check the box if this item is not to be shown to the client.

This item will STAY hidden from your client from the interactive view of the proposal. They will be able to see the rest of the items in the package, but not the items that were marked to hide from the client.

- You will have to check the box to hide it from your client *before* adding the item to the package. The hide item check box is not available from the **Edit Line Item Costs** screen within the package.
- *Remember, this is because the client pricing side is manipulated differently when building packages. You’re manipulating the client side by setting the min and max unit quantities and setting unit price and/or margin from there.*

If you originally chose to hide the item and later on you want this item to be visible to your client, you’ll have to remove the item from the package, leave the **Edit Your Package** screen, go into **Edit Line Item Details** for this line item from Step 3, uncheck the hide item check box, click **Save Changes**, and then go back into the **Edit Your Package** screen and add the item from the **Select additional items for this package section**.

### **Copying Packages**

Copying packages has its own rules document. Please check there for more information.


## Display options in packages

### **Change how Alternate packages are displayed on your proposal**

From Step 3, Items For Your Proposal:

1. Click  (next to the alternative package title)



2. Check the box  next to an alternative package to make it the first (main) option. Only the first option is included in the Pricing Table.
3. Use the grabber bars  to drag the packages into the order you want them displayed on the proposal.

**Set the proposal output options for your package**

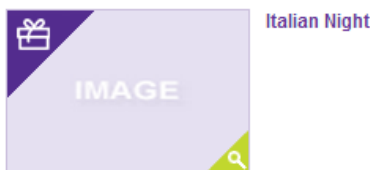
- You should add a unique overall package image for the package in **Step 4 – Update Descriptions**. This will give one overall image for your client to focus on in relation to the package you are selling. No default image will be provided. If you do not add an image your main package photo will look like the “IMAGE” box to the right.
- For each package, you’ll need to select your display options from **Step 4 – Update Descriptions**:
  - Display the images and descriptions of packaged items in your proposal output (available in the interactive version only).
  - Display packaged items in the pricing table of your proposal output.
  - 
  - Display the images and descriptions of the packaged items in your proposal output:** This option allows you to decide whether or not you want the photos and descriptions of each individual item in a package to be displayed in the Client Interactive View for this proposal.
  - Display the packaged items in the pricing table of your proposal output:** This option allows you to display each line item’s name in the pricing table of the Client Interactive View for this proposal. The quantity and price per line item will not be displayed, only the overall quantity and price of the package itself will be displayed.

**How the different proposal display options for packages look to your client**

Here visually is the difference between these package display options and how they affect the Client Interactive View:

**Neither box is checked in Step 4:**

**Packaged Items**



Item	Qty:	Unit Price:	Hrs:	Subtotal:	Taxes:	Total:	
Italian Night	20	\$405.00		\$8,100.00	-	\$8,100.00	
<i>Alternative Package</i>	<input type="checkbox"/> ALT 20	\$398.10		\$7,962.00	\$398.10	\$8,360.10	
<b>Event Subtotals:</b>				<b>\$8,100.00</b>	<b>\$0.00</b>	<b>\$8,100.00</b>	

Only the "Display the images and descriptions of the packaged items in your proposal output" box is checked in Step 4:

Packaged Items



Italian Night



**Wine Bar and Small Plates** Enoteca - Italian wine bar and small plates. Price is per person.



**Make Your Own Pasta and Sauce** Pasta and sauces from scratch menu. Price is per person.




**Aprons** Hand painted take home AndyFood aprons. Price is per person.

Item	Qty:	Unit Price:	Hrs:	Subtotal:	Taxes:	Total:	
Italian Night	20	\$405.00		\$8,100.00	-	\$8,100.00	
<i>Alternative Package</i>	<b>ALT</b> 20	\$398.10		\$7,962.00	\$398.10	\$8,360.10	
<b>Event Subtotals:</b>				<b>\$8,100.00</b>	<b>\$0.00</b>	<b>\$8,100.00</b>	

Only the "Display the packaged items in the pricing table of your proposal output" box is checked in Step 4:


**Packaged Items**



Andy Food Italian Night

Item	Qty:	Unit Price:	Hrs:	Subtotal:	Taxes:	Total:	
Andy Food Italian Night	20	\$405.00		\$8,100.00	-	\$8,100.00	⊖ !
↳ Enoteca - Italian Wine Bar ...							!
↳ Pasta and Sauces from Scratch							!
↳ Aprons							!
<b>Alternative Package</b>	<b>ALT 20</b>	<b>\$398.10</b>		<b>\$7,962.00</b>	<b>\$398.10</b>	<b>\$8,360.10</b>	!
<b>Event Subtotals:</b>				<b>\$8,100.00</b>	<b>\$0.00</b>	<b>\$8,100.00</b>	


Both boxes are checked in Step 4:

**Packaged Items**



Italian Night



**Wine Bar and Small Plates** Enoteca - Italian wine bar and small plates. Price is per person.



**Make Your Own Pasta and Sauce** Pasta and sauces from scratch menu. Price is per person.



**Aprons** Hand painted take home AndyFood aprons. Price is per person.

Item	Qty:	Unit Price:	Hrs:	Subtotal:	Taxes:	Total:	
Italian Night	20	\$405.00		\$8,100.00	-	\$8,100.00	⊖ !
↳ Wine Bar and Small Plates							!
↳ Make Your Own Pasta and Sauce							!
↳ Aprons							!
<b>Alternative Package</b>	<b>ALT 20</b>	<b>\$398.10</b>		<b>\$7,962.00</b>	<b>\$398.10</b>	<b>\$8,360.10</b>	!
<b>Event Subtotals:</b>				<b>\$8,100.00</b>	<b>\$0.00</b>	<b>\$8,100.00</b>	