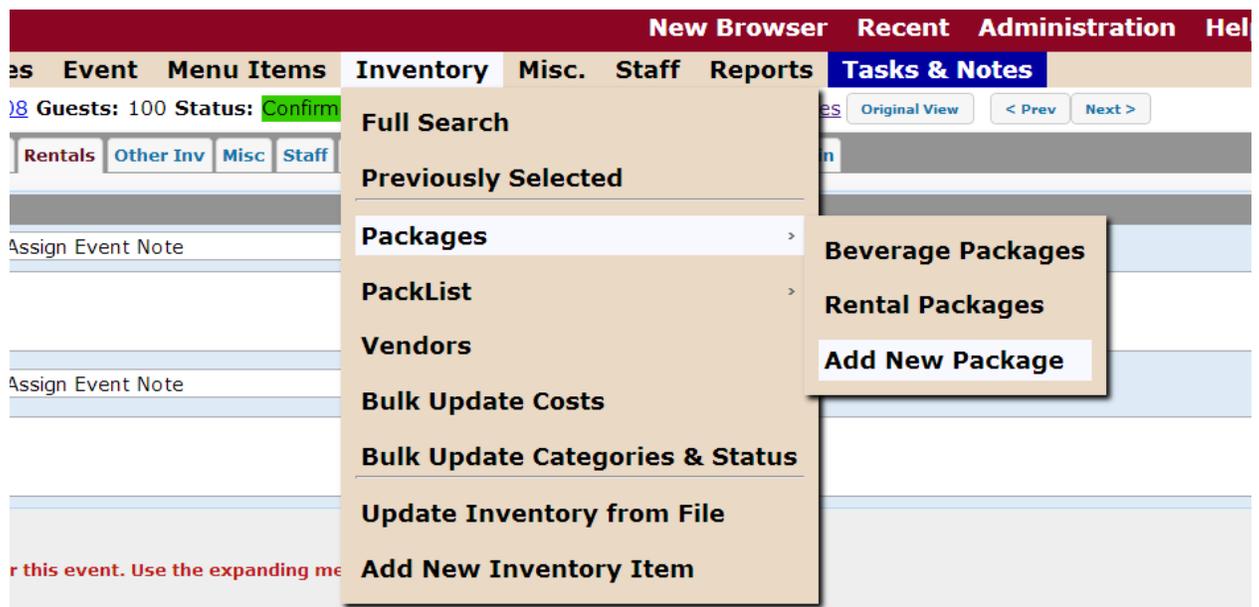# Creating Beverage Packages

Beverage Packages are composed of individual beverage items bundled into a package and assigned a price. This document will review how to build a Beverage Package, and then add it to an event.

Step 1: Create a Beverage Package

 From the navigation menu bar, select **Inventory > Packages > Add New Package**

(Note: **Red** highlighted labels are required, while **Black** labels are optional)

- We will now assign an "**Item Name**" to the package.
- Assign a **Package Class**, in this case, **Beverages.**
- Enter the **Cost Type**. Cost Type is how the package will be charged. The options are:
    - 'Each', which is a flat rate charge.
    - 'Per Hour', being the amount of hours the package will last.
    - 'Per Person', which defaults to the guest count.
    - 'Per Person Per Hour', which is a quantity based on the number of guests for every hour of the package.
- Choose a **Category.**
- Give the package a **Sale Price** (What we are charging the customer) and an **Actual Cost** (How much you pay for the item). The cost can be zero, if needed.
- **Description** (Detailed information about the Beverage Package)
- **Vendor** (Great to enter if applicable can run reports based on Vendor)

- **Tax Scheme – Set your Tax Rate for the package, Tax 1, Tax 2, Tax 3** . The tax percentage rate comes from Taxing Rules located in Administration > Business > Taxing Rules
- **Tax Exempt Scheme-** This rule will go into effect if the event is flagged as Tax Exempt.
- **Second Tax Scheme-**When there are multiple tax charges associated with package
- **Second Tax Exempt Scheme-** This rule will go into effect if the event is flagged as Tax Exempt.
- **Service Charge? -** Charge for services provided (If Necessary)
- **Gratuity? -** Payment for service, either in addition to or in lieu of the service charge.

    Press Save

Step 2: Adding Items to a Beverage Package

Now that the package details have been established, we will now add Inventory items to this package. Let's start from the 'Rental Package Items' tab.

- Select **'Add/Update Package Items'**
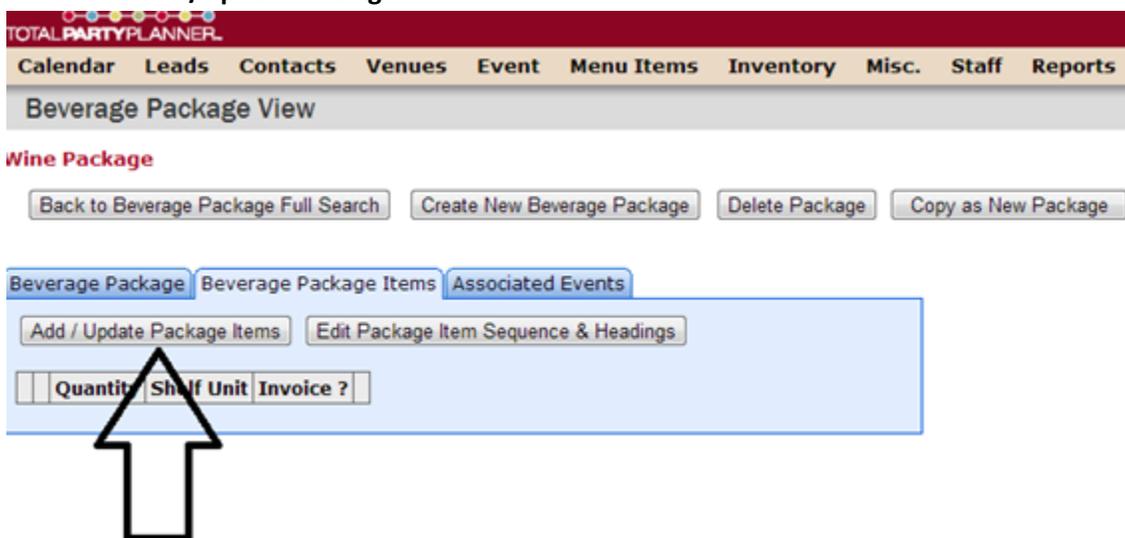
- Then **'Available Inventory Items'** tab. You can perform a search for specific items or group search by classification.
- Type the name of the item(s) you would like to add to the Beverage package in the search.
- After the inventory search has been completed, the items must then be added to the package. Select the check box to the left of the inventory item.
- Be sure that the Quantity has an entry. If not, the item quantity will default to the guest count.
- The 'Invoiced?' check boxes should be selected if the customer is going to be billed for the items in the package.
- Add to Package

Step 3: Managing Beverage Package

Now that all items have been added to the package, let's look at the next tab, 'Current Package Items'

- The **Current Package Items** tab displays a summary of all items added to the package.
- There are three selection buttons if there are any changes that need to be made to the package. If there is an item you would like to edit, select the box to the left of the name.
- To remove the item, select **'Remove From Package'**.
- If you make an edit to the line item (Quantity, or Invoice), click on '**Update Selected**'.
- To re-sequence the order of the line items, choose '**Change Item Sequence**'.

Step 4: Adding Beverage Package to an Event

Now that we have finished managing the Rental Package items, the next step is to add the items to the event.

- Create/Pull up an event.
- Select **'Beverages'** tab
- Navigating to the Toolbar to the left, select, '**Manage Beverage Packages'**
- Under the **'Add Beverage Items/Packages'**, select the 'Category' and 'Package' to locate the Beverage Package you just created.
- Select the Beverage Package that you are adding to the event.
- We are now looking at the **'Manage Beverage'** window. This is a good time to observe all of the components of the package, as well as the other package details.

- Confirm the price and cost (if applicable) of the package. Review the Qty and Taxes associated with the package.
- Looking at the list of items added to the event; click the **Item** box in grey header bar to select all items.
- Observe the triangle icon next to the item name. Clicking on the icon will open a drop down allowing you to enter more detailed item information and review before adding to event.
- The **Event Amount** should be set to 1, unless the item Qty matches the guest count or needs to be set differently
- Verify the **Price** of each item. Be certain to verify how the customer will be charged. Decide whether all items are **Invoiced**

    (Note: If '**Include Package Details'** is checked, the Contact will be charged for both the package price and the individual items. If the items are not 'Invoiced', and 'Include Package Details' is checked, the Contact will be charged the Package price only. Lastly, if 'Include Package Details' is unchecked, and the items are checked, only the rental items will be added to the event, not the package listing.)

- Click **'Add to Event'**