



Products & Packages

Manage your catalog of billable items — individual products and services, bundled packages, and tax rates — all used when creating quotes and invoices.

Key Features

- **Products List:** View, search, filter, and manage all your items with sortable columns, pagination, and a toggle between table and card view
- **Product Types:** Categorize items as Service, Product, Rental, or Labor
- **Billing Cycles:** Set items as one-time, monthly, or annual charges
- **Packages:** Bundle multiple products into a single offering with optional discounts — view as cards or a table
- **Tax Rates:** Define reusable tax rates that auto-apply to quotes and invoices
- **Quick Stats:** Dashboard cards show total products, active items, services, and packages at a glance

How to Use

Adding a Product

1. Go to **Products & Packages** and make sure you're on the **Products** tab
2. Click **New Product**
3. Enter a name and select the type (Service, Product, Rental, or Labor)
4. Set the price, unit (e.g. hour, day, each), and billing cycle
5. Optionally add a category and SKU for organization
6. Check **Taxable** if tax should apply, and **Active** to make it available
7. Click **Save Product**

Managing Products

- **Search** by name, description, category, or SKU using the search bar
- **Filter** by type, status, or billing cycle using the dropdown filters
- **Switch views** using the table/card toggle at the top of the list — your preference is saved
- **Edit** any product using the edit button on its row or card
- **Toggle status** to activate or deactivate a product without deleting it
- **Select multiple** products to activate, deactivate, or delete them in bulk
- Products used in invoices, quotes, or packages cannot be deleted — deactivate them instead

Creating a Package

1. Click the **Packages** tab, then **New Package**
2. Give the package a name and optional description and category
3. Click **Add Product** to add items from your product catalog (at least one is required)
4. Set quantity for each item; optionally override the price for that item within the package
5. Set a fixed package price, or leave blank to use the sum of item prices
6. Optionally apply a discount (fixed dollar amount or percentage)
7. Click **Save Package**

Setting Up Tax Rates

1. Click the **Tax Rates** tab, then **New Tax Rate**
2. Enter a name (e.g. "California Sales Tax"), the percentage rate, and optionally a state/region
3. Check **Default rate** to auto-apply it on new quotes and invoices
4. Click **Save Tax Rate**

Use the **Quick Add** buttons to instantly add common US state tax rates (CA, NY, TX, FL, IL, PA,

NJ, WA, GA, NC) without typing.

Tips

- Set one tax rate as the **Default** — it will be pre-selected when creating quotes and invoices; click the star icon next to any rate to make it the default
- Use **categories** to group related products (e.g. Photography, Design, Post-production)
- Packages show a **savings** amount when the package price is lower than the sum of individual items
- Products are shared across quotes and invoices — updating a product does not change past documents
- Products are shared across your entire company account and are available when creating any quote or invoice