

Sales Tax Scenarios 2019

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This guide is intended for Duggal Visual Solutions general users specifically. Information herein may contain customizations and particulars specific to the Duggal aACE system. Click this [link](https://aace5.knowledgeowl.com/help) (<https://aace5.knowledgeowl.com/help>) for the General aACE Software aACE 5 Knowledge Base.

Sales Tax Scenarios - (As-Of 2019)

There are many input fields for proper sales tax calculations in aACE. The below article will attempt to explain the relevant fields and data utilized for different Ordering and Shipping scenarios.

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Common Scenarios

Scenario #1 - Company Tax Profile Override (Exempt and Resale)

If an Order is created for a Company whose **Tax Profile** field is set to "**RESALE/EXEMPT**", then no tax is charged to the Order.

The Accounting Department can change a Company's **Tax Profile**. In order to do so, they are required to have the Company's Sales Tax Exemption Certificate on file.

This may be stored in the Company's aACE record using the **Cert** upload button.

Tax Setup

Tax Profile > **RESALE/ EXEMPT** Tax ID

Exempt Use Code	Exempt No	Cert	Exp Date
F			

A) Federal government (United States)

B) State government (United States)

C) Tribe / Status Indian / Indian Band (both)

D) Foreign diplomat (both)

E) Charitable or benevolent org (both)

F) Religious or educational org (both)

G) Resale (both)

H) Commercial agricultural production (both)

I) Industrial production / manufacturer (both)

J) Direct pay permit (United States)

K) Direct mail (United States)

L) Other (both)

N) Local government (United States)

P) Commercial aquaculture (Canada)

Q) Commercial Fishery (Canada)

Unit Price
10.00
100.00
100.00
425.00

Company: Matthew Pelfrey (MP4) ACTIVE

Company Details Sales & Marketing **Customer Details** Vendor Details Restricted Access Notices Emails Docs

Billing Address Sync with Office ☒

Billing Salutation (Company Name)
Matthew Pelfrey

Address
1 Park Ave

City State / Prov Postal Code
New York NY 10016-5802

Country Postal Format Currency
US American USD

Billing Setup **Payment** ☐ Approved

A/P Contact > Deliver Invoice Via

Email Last Order Date
6/17/2019

Billing Terms Rate Card > Discount %
0%

A/R Balance Credit Limit Credit Balance Finance Charge
0.00

Ship Rate Type Rate Value Ref Comm Type Ref Comm Pct

☐ Require Customer PO ☒ Credit Hold ☐ PNW

Tax Setup Tax Exempt ☐

Tax Profile > **DEFAULT TAX PROFILE** Tax ID

Exempt Use Code	Exempt No	Cert	Exp Date
F			

Shipping Setup

Courier Service Account #

Shipping Terms FOB

Scenario #2 - Delivery Type=Ship Together, but no Shipment created (the Default)

If no shipments are created for an Order, and the **Delivery Type** field is set to **Ship Together** (default), **Ship Separately**, or **Not Applicable**; then the address populating the **ShipTo** address fields (by default the client corporate address) will determine the tax rate applied to

the Order by default. (Meaning, if a NYC address populates the ShipTo, NYC tax will be applied.)

The assumption in this scenario, absent any other information, is that the Order was shipped and delivered to the client default address, even though no recording of the event took place.

Note: The **Adjustment** field under the Subtotal is always taxed using the rate derived from the ShipTo address, regardless the scenario.

Record: 2 of 200

New Edit Delete Print Actions

Order: 668235 Matthew Pelfrey 06/17/19 PENDING

Production Order Management Job Costs & Approvals Reveal Folder Notices Emails Docs

Bill To

Customer (Bill To) > Matthew Pelfrey (MP4) Contact > Sales Rep > House Account 2nd Sales Rep [Acct M] Customer PO # Billing Terms

Shipping Address Use Bill To [x] Residential []

Addresses: Matthew Pelfrey 1 Park Ave

New York NY 10016-5802 US American

Activities & Comments

Non-Prd Notes

Invoice Description

Order Items Schedule Override

Rev	Department	Line Item Code	Description	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	310-2	DCP14	Digital C Print 11X14	10	1	1.07	10.00	0.00	100.00	DEF

Message: DCP14: 8.88 Shipping: 0.00 [The item total is 0.00.] Adjustment: 0.00 [The item total is 0.00.] OK

Fulfillment

Ffmt Priority Start Date Ship Date Ship Time

Normal 06/17/19 06/19/19 1:30 PM

Job > 6/19/2019 Suggested

Invoice Summary

Subtotal	100.00	100%
Adjustment	0.00	
Total	100.00	100%
Shipping	0.00	PSO
Tax	DEF 8.88	Exempt 92%
Grand Total	108.88	
Payment Due	0.00	

Dept: 910-1 Assigned By: Matthew Pelfrey Assigned To: Matthew Pelfrey Tracking Status: Quote Project Manager: Cancel Save

Scenario #3 - Client Will Pick Up

If the Order's **Delivery Type** field is set to **Pick Up**, the address of the order-writer's Office is used to determine the appropriate tax-rate.

The assumption in this scenario is that the delivery/pick-up location is the place of initial order-write up.

Record: 13 of 218

Order: 668235 Matthew Pelfrey 06/18/2019

Production Order **Management** **Job Costs & Approvals** [Rev](#)

Bill To

Customer (Bill To) > **Matthew Pelfrey (MP4)**
Sales Rep > **House Account**
Customer PO #
Billing Terms
Disc % **0%**

Ship To

Ship To Company > **Matthew Pelfrey**
Delivery Type **Pick Up**
Shipping Terms **FOB**
Use Bill To ☐ Ship To Contact >
Courier Service **Pick Up**
Email Address
Notify ☒

Every **Order-Writer** has a **TeamMember** record.

Each **TeamMember** record is assigned to an **Office**.

Each **Office** record is assigned an *Internal Company* record.

Every **Company** record has an address. This is the address used in determining tax for a **Pick-Up Order**.

Record: 1 of 2

Team Member: Matthew Pelfrey (MP)

ACTIVE

Member Details **Human Resources** [Notices](#) [Emails](#) [Docs](#)

General Info

Photo
Title **Director of Process and Compliance**
Type **Employee**
Contact Info
Email **mpelfrey@duggal.com**
Phone **(646) 638-7131**
Direct Phone **(646) 638-7131**
Best Way to Reach
Office Info
Office > **Duggal Visual Solutions -**
Department **ADMIN SUPPORT**

Offices

Record: 1 of 1
Office: Duggal Visual Solutions - Shared (1)
ACTIVE
Office Details
General Info
Tax ID **130000**
AvaTax Co Code
Office Info
Address Title (Company Name) **Shared**
Address **N/A**
City **New York** State / Prov **NY** Postal Code **10010**
Country **USA** Postal Format **American**
Payment Address
Payment Title (Company Name) **Duggal Visual Solutions**
Address **10 West 24th Street**
City **New York** State / Prov **NY** Postal Code **10010**
Country **USA** Postal Format **American**

Company

Record: 1 of 1
Company: Duggal Visual Solutions (25)
INTERNAL
Company Details **Sales & Marketing** **Customer Details**
Company Info
Type **INTERNAL**
Address **63 Flushing Ave, Building 25
The Brooklyn Navy Yard**
City
State / Prov
Postal Code
Contact Info
Phone
Fax
Email
Web Address

Customer (Bill To) > Matthew Pelfrey (MP4)	Contact > Matthew Pelfrey	63 Flushing Ave, Building 25 The Brooklyn Navy Yard Brooklyn NY 11205 USA American	
Sales Rep > House Account	2nd Sales Rep [Acct M]		
Customer PO #	Billing Terms		
Non-Prd Notes		Invoice Description	

Order Items	Schedule	Override								
Rev	Department	Line Item Code	Description	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	310-2	DCP14	Digital C Print 11X14	10	1	1.07	10.00	0.00	100.00	DEF

Subtotal	100.00	100%
Adjustment	0.00	
Total	100.00	100%

Scenario #4 - Delivery Type=Ship Together, Shipment created, All Order Items Shipped

If a Shipment is created, all Order Items are applied to the Shipment's packing List, the Shipment's declared value field is left blank, and the shipment is marked "Shipped"; the entire Order will be taxed based on the Shipment's Shipped-To address.

Shipment: 89851	Matthew Pelfrey	PENDING
Outgoing Shipment		

Shipped To Company > Matthew Pelfrey Shipping Terms Order > 668235	Shipping Address Addresses: DisneyLand - 1313 Disneyland Dr Matthew Pelfrey 1313 Disneyland Dr Attn: Mickey Mouse Anaheim CA 92802 USA American	Description Package IDs
--	--	---------------------------------------

Line Item Code	Description	Order	Purchase Order	Exp Qty	Quantity	Weight	Ref #(s)
1 > DCP14	Digital C Print 11X14 GLOSSY	668235		10	10	0	#s

Scenario #5 - Delivery Type=Ship Together, Shipment created, Not All Order Items Shipped

If a Shipment is created, but only SOME Order Items are applied to the Shipment's Packing List (some quantity of the line items are not applied to a shipment), the Shipment's declared value field is left blank, and the shipment is marked "Shipped"; the Order Line Item values assigned to the Shipment plus the Shipment's related shipping charges will be taxed based on the Shipment's Shipped-To address.

The remaining value of the Order will be taxed based on the Order's Ship-To address (the default).

Shipment: 89852 Matthew Pelfrey 6/17/2019

SHIPPED ☐

Outgoing Shipment

Notices
Emails
Docs

Shipped To

Residential ☐

Company >
Contact >

Shipping Terms
FOB
Value

Order >
Purchase Order >
Invoice >

Shipment Info

Purchased ☐

Courier Service
Courier Account #
Shipping Cost

Package Type
L x W x H
Weight

Courier Tracking #
Ship Date

Description

Package IDs

Packing List

Line Item Code	Description	Order	Purchase Order	Quantity	Weight	Ref #(s)
1 > DCP14	Digital C Print 11X14 GLOSSY	> 668235		5	0	#s

Scenario #6 - Delivery Type=Ship Together; Partial Shipped, Partial Picked up

If a Shipment is created, but only SOME Order Items are applied to the Shipment's Packing List (some quantity of the line items are not applied to a shipment), the Shipment's declared value field is left blank, and the shipment is marked "Shipped"; the Order Line Item values assigned to the Shipment plus the Shipment's related shipping charges will be taxed based on the Shipment's Shipped-To address.

The remaining value of the Order will be taxed based on the Order's Ship-To address (the default). If the Order's Delivery Type is changed to Pick Up, the Order's Ship-To address will be the Order-Writer's Office address, and tax will be calculated from the office address.

Scenario #7 - Delivery Type=Ship Together, Multiple Shipments created

If multiple Shipments are created, all Order Items are applied to the Shipments' packing lists, the Shipments' declared value fields are left blank, and the shipment is marked "Shipped"; the values of each Shipment's Packing List plus the Shipment's related shipping charges will each be taxed based on the Shipment's Shipped-To address.

Order: 668235 Matthew Pelfrey 06/17/2019 OPEN

[Production Order](#) [Management](#) [Job Costs & Approvals](#) [Notices](#) [Emails](#) [Docs](#)

[Overview](#) [Billing](#) [Procurement](#) [Fulfillment](#) [Shipping](#) [Assets \(YAG\)](#)

Shipments

Shipment	Delivery Date	Title	Type	Courier Service	Courier Tracking #	Cost	Inv Shipping	Tracking Status	Status
> 89852	06/17/19	Matthew Pelfrey	OUT	FedEx Ground		10.00	13.00		
> 89853	06/17/19	Matthew Pelfrey	OUT	UPS Ground		10.00	13.00		

Scenario #8 - Delivery Type=Ship Together, Shipment created, Declared Value stated

If a Shipment is created, all Order Items are applied to the Shipment's packing List, **the Shipment's declared value field is populated**, and the shipment is marked "Shipped"; the amount populating the Value field will be taxed based on the Shipment's Shipped-To address. **The Value field overrides the value calculated by the Unit Price x Qty of the Order Line Items in the Shipment's Packing List.**

The remaining value of the Order, if there is any, will be taxed based on the Order's Ship-To address (the default).

Order: 668236 Matthew Pelfrey 06/17/2019 OPEN

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[Overview](#) [Billing](#) [Procurement](#) [Fulfillment](#) [Shipping](#) [Assets \(YAG\)](#)

Order Item Description	BO	DS	SO	Ord	Proc	Prd	Invoiced	Shipped	Ordered	Value	Invoiced	Remain
Digital C Print 11X14				10		0/10	0/10	1/10	100.00	30.00	0.00	100.00

Shipping Log

Record: 1 of 1 New Edit Delete Print Actions

Shipment: 89854 Matthew Pelfrey 6/17/2019 SHIPPED

[Outgoing Shipment](#) [Notices](#) [Emails](#) [Docs](#)

Shipped To Residential Star

Company > **Matthew Pelfrey** Contact >

Shipping Terms FOB Value **30.00**

Order > **668236** Purchase Order > Invoice >

Shipment Info Purchased

Courier Service **FedEx Ground** Courier Account # Shipping Cost **10.00**

Package Type L W H Weight

0 x **0** x **0** **0**

Courier Tracking # Ship Date **06/17/19**

Description

Package IDs

Packing List

Line Item Code	Description	Order	Purchase Order	Quantity	Weight	Ref #(s)
1 > DCP14	Digital C Print 11X14 GLOSSY	> 668236		1	0	#s

Scenario #9- Changing the Tax Profile of an Order or Order Line

If the tax profile is changed at the Line Item, or for the Order, as a whole, to a Profile that specifies a PARTICULAR rate, the Tax Profile's rate will overwrite any address-related tax calculations. [\[See Explanation of Tax Profiles\]](https://www.google.com/url?q=https%3A%2F%2Fsites.google.com%2Fduggal.com%2Fduggal-wiki%2Fface%2Fsales-tax-setup%3Fauthuser%3D0%23h.p_3omZAdzmdcvC&sa=D&sntz=1&usg=AOvVaw2CseG--SuoFku46GM5xoxJ) (https://www.google.com/url?q=https%3A%2F%2Fsites.google.com%2Fduggal.com%2Fduggal-wiki%2Fface%2Fsales-tax-setup%3Fauthuser%3D0%23h.p_3omZAdzmdcvC&sa=D&sntz=1&usg=AOvVaw2CseG--SuoFku46GM5xoxJ)

Record: 3 of 201

New Edit Delete Print Actions

Order: 668236 Matthew Pelfrey 06/17/19 OPEN

Production Order Management Job Costs & Approvals

Customer (Bill To) > Matthew Pelfrey (MP4) Contact > Ship To Company > Use Bill To X Ship To Contact > Matthew Pelfrey

Sales Rep > House Account 2nd Sales Rep (Acct Mgr) > Delivery Type Courier Service Courier Account # Ship Together

Customer PO # Billing Terms Disc % 0% Shipping Terms FOB Email Address Notify X

Non-Prd Notes Notes for Invoice Invoice Description

Order Items Schedule Override

Rev	Department	Line Item Code	Description	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit	310-2	DCP14 Digital C Print 11X14	10	1	1.07	10.00	0.00	100.00	DEF
2	Submit	310-2	DCP20 Digital C Print 16X20	1	1	2.22	20.00	0.00	20.00	DEF

Sales Lead > Sales Priority Normal Likely Value 100.00% Campaign > Type Production Route Source

Fulfillment Ffmt Priority Normal Start Date 06/17/19 Ship Date 06/20/19 Ship Time 2:00 PM Job > 668236

Subtotal Adjustment Total Shipping 0.00 Tax DEF Grand Total Payment Due

01001 CA: Albany
01002 CA: Emeryville
01003 CA: Hayward
01004 CA: Livermore
01005 CA: Piedmont
01006 CA: Pleasanton
01007 CA: San Leandro
01008 CA: Newark
01009 CA: Fremont
01010 CA: Alameda
01011 CA: Union City
01013 CA: Dublin
01020 CA: Berkeley
01060 CA: Oakland

Dept: 910-1 Assigned By: Matthew Pelfrey Assigned To: Matthew Pelfrey Tracking Status: Open Order Project Manager

Avatax will skip calculations related to these Fixed Rate Profiles.

Order Items Schedule Override

Rev	Department	Line Item Code	Description	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit	310-2	DCP14 Digital C Print 11X14	10	1	1.07	10.00	0.00	100.00	DEF
2	Submit	310-2	DCP20 Digital C Print 16X20	1	1	2.22	20.00	0.00	20.00	ALB

Message: DCP14: 8.39 DCP20: 1.60 [The related tax profile does not have AvaTax enabled.] Shipping: 0.94 OK

Fulfillment Ffmt Priority Normal Start Date 06/17/19 Ship Date 06/20/19 Ship Time 2:00 PM Job > 668236

Subtotal Adjustment Total Shipping 0.00 Tax DEF Grand Total 143.93 Payment Due 143.93

Dept: 910-1 Assigned By: Matthew Pelfrey Assigned To: Matthew Pelfrey Tracking Status: Open Order Project Manager

Scenario #10 - Delivery Type=Ship Together, Shipment created, PSO (Prevent Shipping Override) activated

If the **Shipment** subtotal field, under the Order subtotal, is overwritten (this is done by unchecking the PSO checkbox), rather than (by default) summed from the Order's related

Shipments; the shipping amount entered is taxed using the tax rate derived from the Order's ShipTo address. Even if Shipments exist with Pricing, once the Shipment Subtotal is manually populated, all shipment related calculations of shipping charges are overwritten. Order Line Item values are taxed as before. Only the Shipping charges are effected by deactivating the PSO checkbox.

Record: 3 of 201

Order: 668236 Matthew Pelfrey 06/17/19 OPEN

Production Order Management Job Costs & Approvals

Reveal Folder Notices Emails Docs

Bill To

Customer (Bill To) > Matthew Pelfrey (MP4) Contact > Sales Rep > House Account 2nd Sales Rep [Acct Mgr] > Customer PO # Billing Terms Disc % 0%

Ship To

Ship To Company > Use Bill To X Ship To Contact > Matthew Pelfrey Delivery Type Courier Service Courier Account # Ship Together Shipping Terms FOB Email Address Notify X

Activities & Comments

Non-Prd Notes

Notes for Invoice

Invoice Description

Order Items Schedule Override

Rev	Department	Line Item Code	Description	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit	310-2	DCP14 Digital C Print 11X14 GLOSSY	10	1	1.07	10.00	0.00	100.00	DEF

Message

DCP14: 8.39
Shipping: 2.22
Adjustment: 0.00 [The item total is 0.00.]

Fulfillment

Print Priority Start Date Ship Date Ship Time
Normal 06/17/19 06/20/19 2:00 PM
Job > 668236 6/19/2019 Suggested

Summary

Subtotal	100.00	100%
Adjustment	0.00	
Total	100.00	100%
Shipping	0.00	25.00 X PSO
Tax	DEF	10.61 Exempt
Grand Total	135.61	92%
Payment Due	135.61	

Dept: 910-1 Assigned By: Matthew Pelfrey Tracking Status: Open Order Project Manager: Cancel Save

Record: 3 of 201

Order: 668236 Matthew Pelfrey 06/17/19 OPEN

Production Order Management Job Costs & Approvals

Reveal Folder Notices Emails Docs

Bill To

Customer (Bill To) > Matthew Pelfrey (MP4) Contact > Sales Rep > House Account 2nd Sales Rep [Acct Mgr] > Customer PO # Billing Terms Disc % 0%

Ship To

Ship To Company > Use Bill To X Ship To Contact > Matthew Pelfrey Delivery Type Courier Service Courier Account # Ship Together Shipping Terms FOB Email Address Notify X

Activities & Comments

Non-Prd Notes

Notes for Invoice

Invoice Description

Order Items Schedule Override

Rev	Department	Line Item Code	Description	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit	310-2	DCP14 Digital C Print 11X14 GLOSSY	10	1	1.07	10.00	0.00	100.00	DEF

Message

DCP14: 8.39
Shipping: 2.22
Adjustment: 0.00 [The item total is 0.00.]

Fulfillment

Print Priority Start Date Ship Date Ship Time
Normal 06/17/19 06/20/19 2:00 PM
Job > 668236 6/19/2019 Suggested

Summary

Subtotal	100.00	100%
Adjustment	0.00	
Total	100.00	100%
Shipping	0.00	25.00 X PSO
Tax	DEF	10.61 Exempt
Grand Total	135.61	92%
Payment Due	135.61	

Dept: 910-1 Assigned By: Matthew Pelfrey Tracking Status: Open Order Project Manager: Cancel Save

Scenario 11# - Pick up Client Supplied Materials (only shipping charge, no other charges)

Advanced Scenarios

Scenario #12 - Shipment Distro List imported, Similar Packing Lists

Scenario #13- Shipment Distro List, Only NY and CA addresses imported.

Scenario #14 - Shipment Distro List, Substitute Standard NY and CA addresses, Assign Declared Value to NY and CA deliveries.

Scenario #15 - Shipment Distro List imported, various Packing List requirements not equal to Order Items breakdown