aACE Software

# Create New Shipments

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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) for the General aACE Software aACE 5 Knowledge Base.

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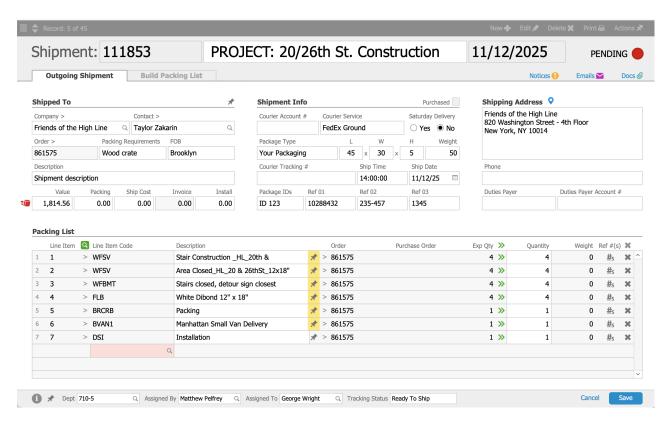[Shipment Effects on Tax Calculations](#)

## Create New Shipment

To create a Shipment, in the Order, go to the Management tab. Select the Shipping subtab.

In the upper left corner of the Shipments list, click the **[+]** icon. Select Shipment.
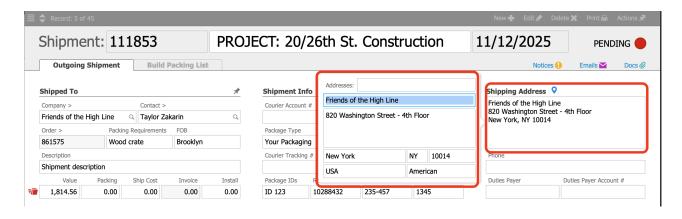
A new Shipment window appears.
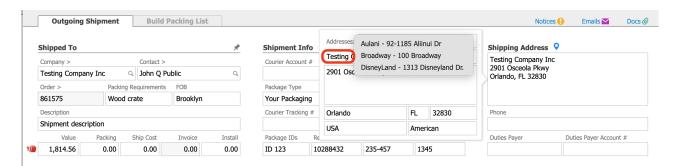


## The Shipped To Address

The Shipping Address defaults to the order's selected ShipTo address.

The ShippedTo address may be viewed and edited by clicking into the Address field. In Edit mode all fields are completely editable.



Also, the Company's Shipping Address Location List can be selected from in the Addresses
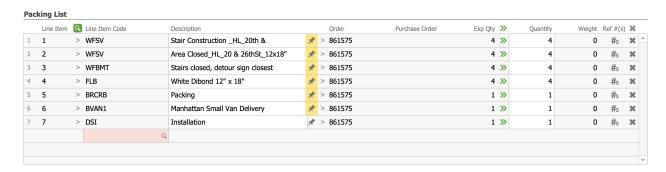
drop down. [See Creating Company Locations] (https://aace5.knowledgeowl.com/help/company-locations-list)



## Packing List

The Packing List is populated by all currently unshipped Order Line Items.

Undesired Line Items can be deleted by clicking the **[x]** on the far right of the Line. Quantities may be edited.



## Courier Selection

Select the desired Courier Service. [See Courier Service Setup for more on Courier Services] (https://aace5.knowledgeowl.com/help/shipping-preferences-and-configuration)
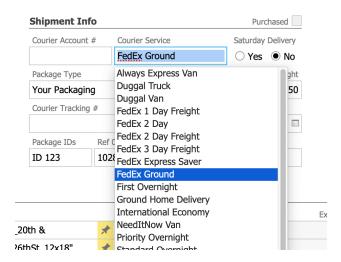
If FedEx or UPS Courier Service is selected, the NRG icon appears.

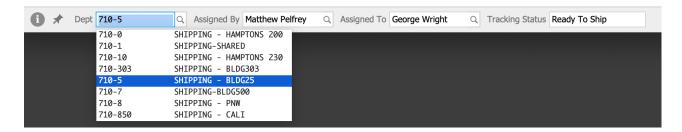[See NRG Integration for more on FedEx and UPS systems integration] (https://aace5.knowledgeowl.com/help/nrg-shipping-fedex-ups-integration)

[See Transmitting to NRG for more on creating and managing FedEx and UPS shipments] (https://aace5.knowledgeowl.com/help/transmit-to-fedex-ups-via-nrg)
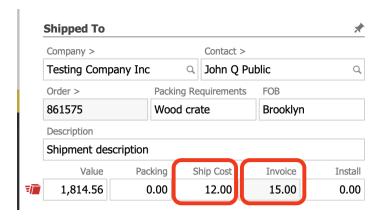
Setting the desired Shipping Dept at the bottom of the window will place the Shipment record in the correct department's queue.



## The Shipping Cost Field

The Shipping Cost field will be populated by the NRG FedEx/UPS engine, if the Shipment is transmitted to NRG. For other couriers, a quoted freight shipment for example, the Cost field may be populated manually. Based on how the Courier Service was set up, [See Courier Service Setup for more on Courier Services] (https://aace5.knowledgeowl.com/help/shipping-preferences-and-configuration), the price of the Shipment that is to be charged to the customer is populated in the "Invoice" field as:
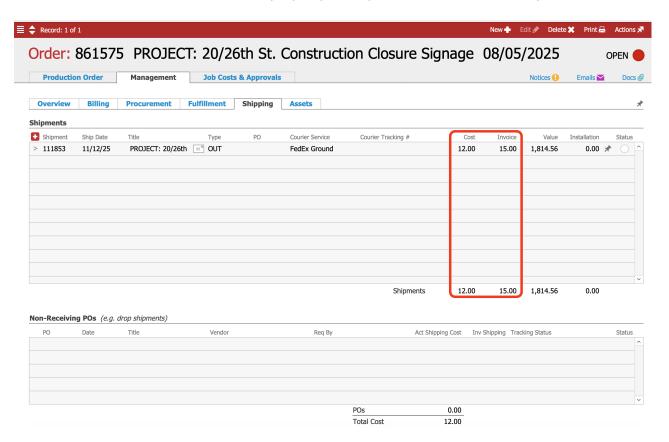
1. A % Mark-up on the Cost field (ex. FedEd and UPS)
2. A % Margin on the Cost field (not currently in use)
3. A set Fixed Price, regardless the entry in the Cost field (Duggal Trucks and Vans)
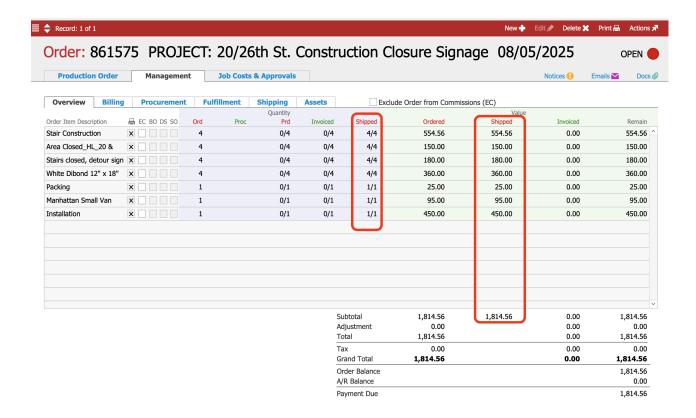
# The Order's Management Tab

## The Shipping Tab View

The Price ("Invoice") and Cost are displayed per Shipment in the Order's Shipment List.
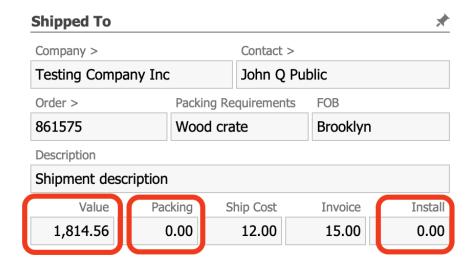


## The Overview Tab View

In the Management tab> Overview subtab, the user can view the Line Item Quantities Shipped as well as the Values Shipped.

## The Shipment Value Field

By default, the Value will equal the quantity x line item unit price, but the value of a Shipment can be overwritten using the Shipment's Declared "Value" field. Packing and Installation activity may have different tax treatment, so their values are summed separately from "all other" charges.



By populating the Value field, the value of the Shipment that is used as the base for tax calculations is changed from the default of a sum of the Packing Slip Line Item Values, to the new value.

This feature can be used for more complicated distributions that are difficult to accurately break apart from the way an Order's Line Items were written. The user can assign a single line item for the packing List and populate the Value field, even if several line items are actually shipped.

## Shipment effects on Tax Calculations

Shipment records are used to to determine sales tax liability. But they are not the only determinant of rates and amounts. The article Sales Tax Scenarios (https://aace5.knowledgeowl.com/help/sales-tax-scenarios) details fifteen different Order and Shipping Scenarios having different effects on the Sales Tax calculation.