

Sales Tax Scenarios

Last Modified on 11/25/2025 1:04 am EST

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 (updated for 2025)

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 Profile > **RESALE/ EXEMPT**

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)
M) Local government (United States)
N) Commercial aquaculture (Canada)
O) 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 Docs

Billing Address Sync with Office
Billing Salutation (Company Name)
Matthew Pelfrey
Address Validate
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 %
A/R Balance Credit Limit Credit Balance Finance Charge
0.00 0%

Tax Setup Tax Exempt
Tax Profile > Tax ID
DEFAULT TAX PROFILE Cert Exp Date
Exempt Use Code Exempt No

Shipping Setup
Courier Service Account #
Shipping Terms FOB

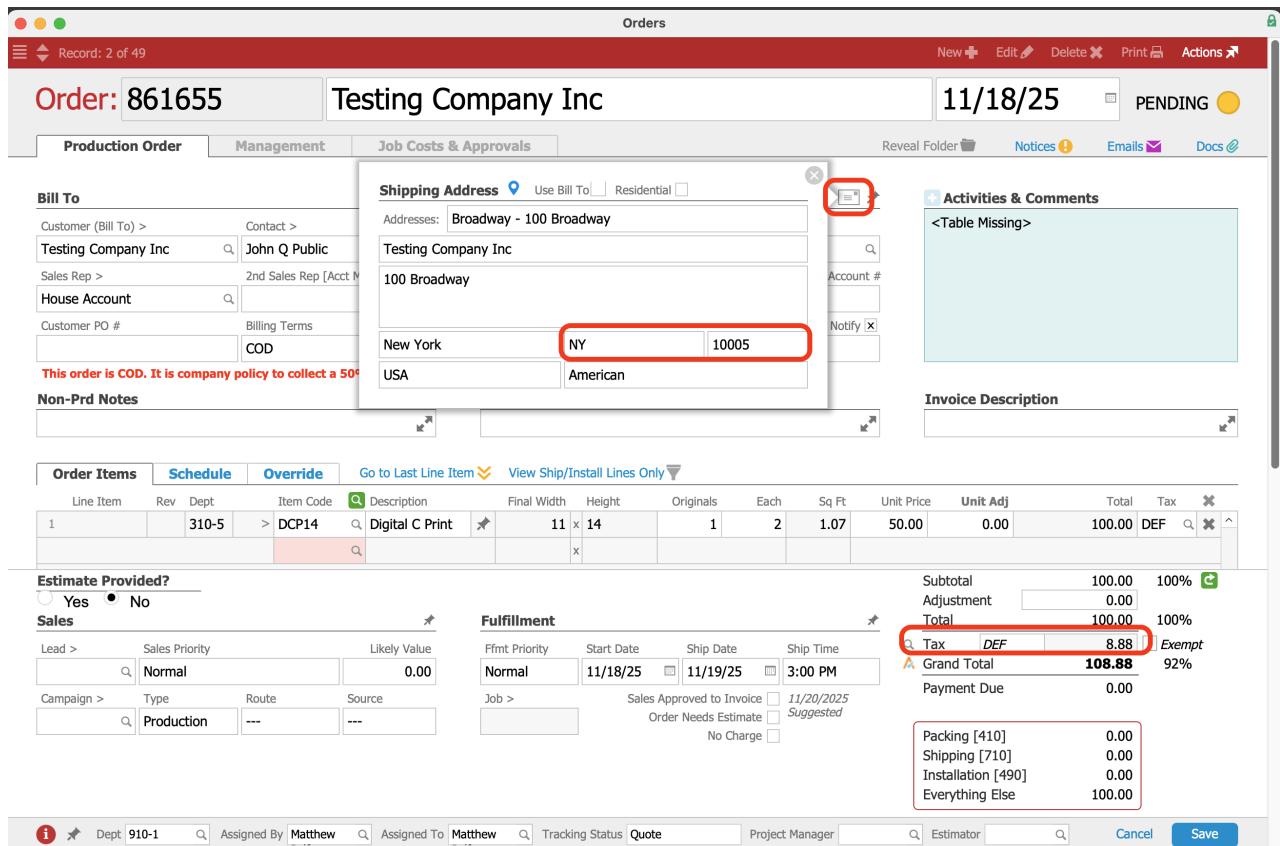
Scenario #2 - Delivery Type=Ship Together, but no Shipment created (the

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.



The screenshot shows the aACE Software Order screen for Order #861655. The **Shipping Address** field is populated with "Broadway - 100 Broadway" and "Testing Company Inc", with "NY" and "10005" highlighted in a red box. The **Tax** field is also highlighted in a red box, showing a value of **8.88**. The **Subtotal** is **100.00**, and the **Total** is **108.88**.

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	Ship To		
Customer (Bill To) > Matthew Pelfrey (MP4)	Contact >	Ship To Company > Matthew Pelfrey	Use Bill To <input type="checkbox"/> Ship To Contact >
Sales Rep > House Account	2nd Sales Rep [Acct Mgr] >	Delivery Type Pick Up	Courier Service Courier Account # Pick Up
Customer PO #	Billing Terms	Shipping Terms	Email Address Notify <input checked="" type="checkbox"/>
		POB	
		0%	

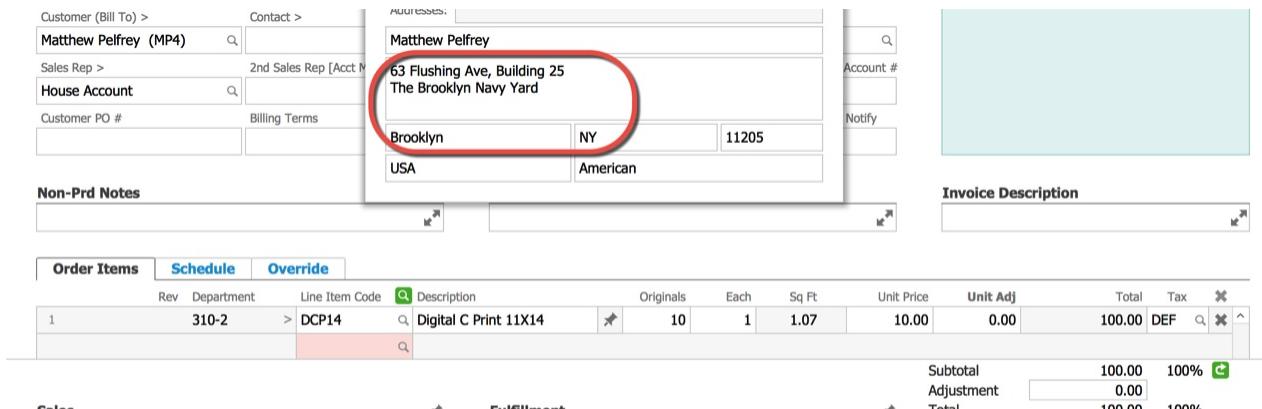
Every Order-Writer has a **TeamMember** record.

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**.

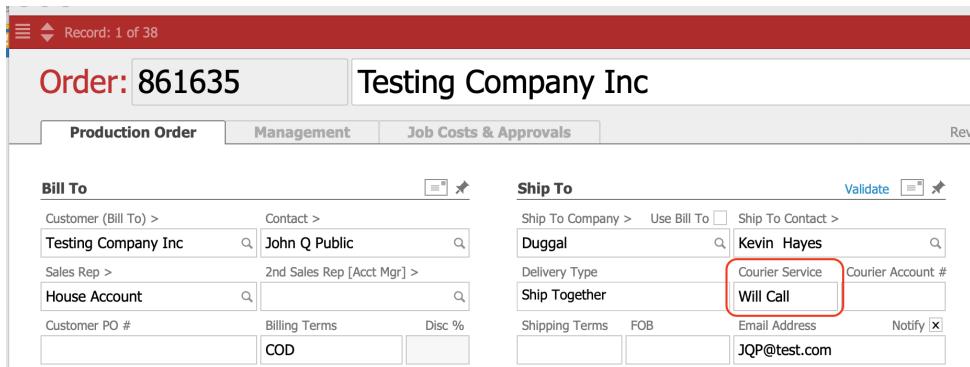
Team Member: Matthew Pelfrey (MP)	Office: Duggal Visual Solutions - Shared (1)	Company: Duggal Visual Solutions (25)
General Info	General Info	Company Info
Photo: Director of Process and Compliance Title: Employee	Tax ID: 13xxxx AvaTax Co Code: Shared	Company: Duggal Visual Solutions Address: 63 Flushing Ave, Building 25 The Brooklyn Navy Yard
Contact Info	Office Info	Address
Email: mpelfrey@duggal.com Phone: (646) 638-7131 Ext: 7131	Address Title (Company Name): Shared Address: N/A	City: New York State / Prov: NY Postal Code: 10010
Best Way to Reach	Office Info	City: New York State / Prov: NY Postal Code: 10010
Office: Duggal Visual Solutions - ADMIN SUPPORT	Address: USA Postal Format: American	Country: USA Postal Format: American
Office Info	Payment Address	Customer Details
Office: Duggal Visual Solutions - ADMIN SUPPORT	Payment Title (Company Name): Duggal Visual Solutions Address: 10 West 24th Street	Phone: <input type="text"/> Fax: <input type="text"/> Email: <input type="text"/> Web Address: <input type="text"/>
Departments	Team Members	Company Details
Department Name: <input type="text"/> Abbr: <input type="text"/> Entity #: <input type="text"/> Dept #: <input type="text"/> Type: <input type="text"/> Heads: <input type="text"/> Sq Ft: <input type="text"/> Start Tl: <input type="text"/>	Abbr: <input type="text"/> Entity #: <input type="text"/> Dept #: <input type="text"/> Type: <input type="text"/> Heads: <input type="text"/> Sq Ft: <input type="text"/> Start Tl: <input type="text"/>	Address: <input type="text"/> City: <input type="text"/> State / Prov: <input type="text"/> Postal Code: <input type="text"/>



The screenshot shows the 'Customer (Bill To) >' section with the address 'Matthew Pelfrey' and '63 Flushing Ave, Building 25 The Brooklyn Navy Yard' circled in red. The 'Non-Prd Notes' section is below, and the 'Invoice Description' section is on the right. The 'Order Items' table shows one item: '1 310-2 > DCP14 Digital C Print 11X14' with a unit price of '10.00' and a total of '100.00'.

Will Call Alternative

Alternatively, if a customer needs to pick up at a location that is different from the Order-Writer's Office, simply enter the Duggal office address into the ShipTo address and select **Will Call** from the Courier Service drop-down list.



The screenshot shows the 'Order: 861635' screen. In the 'Ship To' section, the 'Delivery Type' dropdown is set to 'Ship Together' and the 'Courier Service' dropdown is set to 'Will Call', both of which are circled in red.

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 calculated from the Order Items placed in the Packing List, and the shipment is marked "Shipped"; the entire Order will be taxed based on the Shipment's Shipped-To address.

Shipment: 111878 Testing Company Inc 11/18/2025 PENDING

Outgoing Shipment **Build Packing List**

Shipped To

Company > Testing Company Inc Contact > John Q Public

Order > 861655 Packing Requirements FOB

Description

Value 100.00 Packing 0.00 Ship Cost 0.00 Invoice 0.00 Install 0.00

Shipment Info

Address: DisneyLand - 1313 Disneyland Dr.
Testing Company Inc
1313 Disneyland Dr.
Anaheim, CA 92802

Courier Account #
Package Type
Courier Tracking #
Package IDs Ref

Anaheim CA 92802

USA American

Shipping Address

Testing Company Inc
1313 Disneyland Dr.
Anaheim, CA 92802

Phone

Duties Payer Duties Payer Account #

Packing List

Line Item	Line Item Code	Description	Order	Purchase Order	Exp Qty	Quantity	Weight	Ref #(s)
1 1	> DCP14	Digital C Print GLOSSY	861655		2	2	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 calculated from the Order Items placed in the Packing List, 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: 111878 Testing Company Inc 11/18/2025 PENDING

Outgoing Shipment **Build Packing List**

Shipped To

Company > Testing Company Inc Contact > John Q Public

Order > 861655 Packing Requirements FOB

Description

Value 50.00 Packing 0.00 Ship Cost 0.00 Invoice 0.00 Install 0.00

Shipment Info

Purchased
Courier Account # Courier Service Saturday Delivery Yes No

Package Type L W H Weight

Courier Tracking # Ship Time Ship Date 11/18/25

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
1313 Disneyland Dr.
Anaheim, CA 92802

Phone

Duties Payer Duties Payer Account #

Packing List

Line Item	Line Item Code	Description	Order	Purchase Order	Exp Qty	Quantity	Weight	Ref #(s)
1 1	> DCP14	Digital C Print GLOSSY	861655		2	1	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 not altered, 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).

Once a Shipment is marked "Shipped", the Order's Delivery Type cannot be changed to Pick Up.

If a customer needs to pick up the balance of the Order simply enter the Duggal office address into another Shipment and select Will Call as the Courier Service. The value of the picked-up Shipment will be taxed based on the Shipping Address/Duggal office address.

Record: 2 of 2

Shipment: 111881 Duggal Visual Solutions -Hamptons 11/24/2025 PENDING

Outgoing Shipment **Build Packing List**

Shipped To

Company > Duggal Visual Solutions Contact > George Wright

Order > 861655 Packing Requirements FOB

Description

Value 50.00 Packing 0.00 Ship Cost 0.00 Invoice 0.00 Install 0.00

Shipment Info

Courier Account # Courier Service Purchased Saturday Delivery
Will Call Yes No

Package Type L W H Weight
Package 0 x 0 x 0 0

Courier Tracking # Ship Time Ship Date
11/24/25

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Duggal Visual Solutions -Hamptons
200 Rogers Way
Westhampton Beach, NY 11978

Phone

Duties Payer Duties Payer Account #

Packing List

Line Item	Line Item Code	Description	Order	Purchase Order	Quantity	Weight	Ref #(s)
1	> DCP14	Digital C Print GLOSSY	> 861655		1	0	#s

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 field is left unaltered, and the shipments are marked "Shipped"; the values of each Shipment's Packing List plus the Shipment's related shipping charges will each be taxed based on the individual Shipments' Shipped-To addresses.

Order: 668235 Matthew Pelfrey 06/17/2019 OPEN

Notices Emails Docs

Production Order Management Job Costs & Approvals

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		FedEx Ground		10.00	13.00		
> 89853	06/17/19	Matthew Pelfrey		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 altered, 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).

Record: 1 of 50 OPEN

Order: 861656 Testing Company Inc 11/24/2025 Notices Emails Docs

Production Order Management Job Costs & Approvals

Overview Billing Procurement Fulfillment Shipping Assets

Shipments

Shipment	Ship Date	Title	Type	PO	Courier Service	Courier Tracking #	Cost	Invoice	Value	Installation	Status
> 111882	11/24/25	Testing Company Inc			FedEx Ground		10.00	12.50	35.00	0.00	
> 111883	11/24/25	Duggal Visual Solutions			Will Call		0.00	0.00	50.00	0.00	

Shipping Log

Record: 3 of 4 New Edit Delete Print Actions

Shipment: 111882 Testing Company Inc 11/24/2025 SHIPPED

Outgoing Shipment Build Packing List Notices Emails Docs

Shipped To

Company > Testing Company Inc Contact > John Q Public

Order > Packing Requirements FOB 861656

Non-Receiving POs (e.g.

PO Date

Shipment Info

Purchased Courier Account # FedEx Ground Saturday Delivery Yes No

Package Type L W H Weight

0 x 0 x 0 0

Courier Tracking # 2:00 PM Ship Date 11/24/25

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
1313 Disneyland Dr.
Anaheim, CA 92802

Phone

Duties Payer Duties Payer Account #

Packing List

Line Item	Line Item Code	Description	Order	Purchase Order	Quantity	Weight	Ref #s	X
1	> DCP14	Digital C Print GLOSSY		> 861656	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://aace5.knowledgeowl.com/help/tax-profiles) (<https://aace5.knowledgeowl.com/help/tax-profiles>) [\[See Additional Information Regarding Duggal Specific Legacy Profiles\]](https://aace5.knowledgeowl.com/help/-duggal-aace-5-knowledge-base-sales-tax-set-up) (<https://aace5.knowledgeowl.com/help/-duggal-aace-5-knowledge-base-sales-tax-set-up>).

Order: 861657 Testing Company Inc 11/24/25 PENDING

Bill To

Customer (Bill To) > Testing Company Inc Contact > John Q Public

Sales Rep > 2nd Sales Rep [Acct Mgr] > House Account

Customer PO # Billing Terms Disc %

Ship To

Ship To Company > Testing Company Inc Use Bill To Ship To Contact > John Q Public

Delivery Type Courier Service Courier Account #

Ship Together

Shipping Terms FOB Email Address Notify JQP@test.com

Activities & Comments

<Table Missing>

Non-Prd Notes

Notes for Invoice

Invoice Description

Order Items

Line Item	Rev	Dept	Item Code	Description	Final Width	Height	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax	X
1	310-5	>	DCP14	Digital C Print GLOSSY	11 x 14		1	2	1.07	50.00	0.00	100.00	DEF	<input type="checkbox"/>
2	310-5	>	DCP14M	Digital C PrintMATTE	11 x 14		1	2	1.07	44.00	0.00	88.00	01001	<input type="checkbox"/>

Estimate Provided? Yes No

Sales

Lead > Sales Priority Likely Value
Normal 0.00

Campaign > Type Route Source
Production --- ---

Fulfillment

Ffmt Priority Start Date Ship Date Ship Time
Normal 11/24/25

Job > Sales Approved to Invoice 11/26/2025
Order Needs Estimate Suggested
No Charge

Tax

Subtotal 100.00
Adjustment 0.00
Total 100.00
Tax DEF 6.50
Grand Total 106.50
Payment Due 0.00
Packing [410] 0.00
Shipping [710] 0.00
Installation [490] 0.00
Everything Else 100.00

Activities & Comments

CA: Albany
CA: Emeryville
CA: Hayward
CA: Livermore
CA: Piedmont
CA: Pleasanton
CA: San Leandro
CA: Newark
CA: Fremont
CA: Alameda
CA: Union City
CA: Dublin
CA: Berkeley
CA: Oakland
CA: ALAMEDA COUNTY
CA: ALPINE COUNTY
CA: Jackson
CA: Plymouth
CA: Sutter Creek

Avatax will skip calculations related to these Fixed Rate Profiles.

Order: 861657 Testing Company Inc 11/24/25 PENDING

Bill To

Customer (Bill To) > Testing Company Inc Contact > John Q Public

Sales Rep > 2nd Sales Rep [Acct Mgr] > House Account

Customer PO # Billing Terms Disc %

Ship To

Ship To Company > Testing Company Inc Use Bill To Ship To Contact > John Q Public

Delivery Type Courier Service Courier Account #

Ship Together

Shipping Terms FOB Email Address Notify JQP@test.com

Activities & Comments

<Table Missing>

Non-Prd Notes

Notes for Invoice

Invoice Description

Order Items

Line Item	Rev	Dept	Item Code	Description	Final Width	Height	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax	X
1	310-5	>	DCP14	Digital C Print GLOSSY	11 x 14		1	2	1.07	50.00	0.00	100.00	DEF	<input type="checkbox"/>
2	310-5	>	DCP14M	Digital C PrintMATTE	11 x 14		1	2	1.07	44.00	0.00	88.00	01001	<input type="checkbox"/>

Estimate Provided? Yes No

Sales

Lead > Sales Priority Likely Value
Normal 0.00

Campaign > Type Route Source
Production --- ---

Fulfillment

Ffmt Priority Start Date Ship Date Ship Time
Normal 11/24/25

Job > Sales Approved to Invoice 11/26/2025
Order Needs Estimate Suggested
No Charge

Tax

Subtotal 188.00
Adjustment 0.00
Total 188.00
Tax DEF 15.08
Grand Total 203.08
Payment Due 203.08
Packing [410] 0.00
Shipping [710] 0.00
Installation [490] 0.00
Everything Else 188.00

Message

DCP14: 6.50
DCP14M: 8.58 [The related tax profile does not have Avatax enabled.]

Adjustment: 0.00
Packing: 0.00
Shipping: 0.00
Installation: 0.00

OK

Scenario #10 - Pick up Client Supplied Materials (only shipping charge, no other charges)

If an Order is written using only a shipping code (like TR1), for example for a pick-up not related to a deliverable item; a Shipment can be created from that Order and a NOTE packing list item can be added. The Shipment's Invoice Value will be taxed based on the Shipping address. Any excess charged to the customer over the Shipment's Invoice Value will be taxed based on the Shipment's Shipped-To address.

The screenshot displays two windows of the aACE Software interface. The top window is titled 'Order: 861660 Testing Company Inc 11/24/2025'. It shows the 'Bill To' and 'Ship To' sections, with the 'Ship To' address being '2901 Osceola Pkwy'. The 'Activities & Comments' section is empty. The 'Order Items' table contains one item: '1 1 Submit 710-1 > TR1'. A red box highlights the 'Line Item Code' field 'TR1'. The bottom window is titled 'Shipment: 111887 Testing Company Inc 11/24/2025'. It shows the 'Outgoing Shipment' and 'Build Packing List' sections. The 'Shipment Info' table includes fields like 'Courier Account #' (highlighted with a red box), 'Courier Service' (set to 'Duggal Truck'), and 'Purchased' (set to 'Yes'). The 'Shipping Address' section lists 'Testing Company Inc, 100 Broadway, New York, NY 10005'. The 'Packing List' table contains one item: '1 Line Item Code > NOTE Description PICK UP NOTES'. A red box highlights the 'Line Item Code' field 'NOTE'.