

Tax Calculation Examples

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Tax Calculation Examples

In the examples below:

1. Either installation, packing and production items are entered, or only production items.
2. Either no Shipment was created, a single shipment was created, or multiple shipments sent to different states
3. All Orders have a single shipping Order Item (FEDEX or VAN1)

Example A

No Shipment. Tax Rate for ShipTo Address= Florida 6.5%. FEDEX Order Line Item = \$50

Items: **Only Production Order Items**

Summary: The Invoiced Tax Calculations display each Production Order Item with its value and under each, a line with the language "Unshipped Value" with the value that was not shipped in brackets. This value is applied to the tax rate belonging to the Order's ShipTo Address jurisdiction, in this case Orlando Florida's 6.5%.

The Shipping charged to the customer (\$50.00) appears as well as its own line item and below it is a line with the language "Tax on Shipping Mark-Up" with a value in brackets that is calculated as the *sum of shipping item code values in the Order minus the sum of Suggested Shipping Price values* in related Shipping records. In this example, since there are no Shipments, the sum of Suggested Shipping Price values is 0.00, so the value in brackets, and therefore taxed using the Order's ShipTo Address jurisdiction is equal to the Price of the shipping Order Item.

Record: 1 of 1 New + Edit Delete X Print Actions

Order: 861693 Testing Company Inc 02/16/2026 OPEN

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

Bill To

Customer (Bill To) > Contact >

Sales Rep > House Account

Customer PO # Billing Terms Disc %

Ship To 2901 Osceola Pkwy

Ship To Company > Use Bill To X Ship To Contact >

Delivery Type Courier Account #

Ship Together

Shipping Terms FOB Email Address Notify X

Activities & Comments

This order is COD. It is company policy to collect a 50% deposit before beginning work and full payment before final delivery.

Non-Prd Notes

Notes for Invoice

Invoice Description

#	Line Item	Rev	Dept	Line Item Code	Desc.	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit		340-7	> 10CDF	Cust			X	1	1		10.00	0.00	10.00	DEF
2	Submit		420-7	> 10CAF	Fram			X	1	1		200.00	0.00	200.00	DEF
3	Edit		345-5	> 10ID	Displ			X	1	1		300.00	0.00	300.00	DEF
4	Submit		710-1	> FEDEX	Fede			X	1	1		50.00	0.00	50.00	DEF

Estimate Provided? Yes No

Sales

Lead > Sales Priority Likely Value

Campaign > Type Route Source

Fulfillment

Print Priority Start Date Ship Date Ship Time

Job > Sales Approved to Invoice

Order Needs Estimate No Charge

Subtotal Tax Exempt

Adjustment Grand Total 88%

Payment Due

Packing [410]

Shipping [710]

Installation [490]

Everything Else

Record: 1 of 1 New + Edit Delete X Print Actions

Invoice: 483496 Testing Company Inc 2/16/2026 PENDING

Invoice Details Notices Emails Docs

Bill To

Customer (Bill To) > Contact >

Recur Transaction >

Cust PO # Billing Terms Invoice Due Prnt Expected

Description

Additional Info

Payment Comments

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CDF	Custom Display Fabrication	1	10.00	0.00	10.00	0.65	DEF
> SHIPVAL	Order #861693: Custom Display Fabrication (Unshipped Value [10.00])						DEF
> 10CAF	Frame	1	200.00	0.00	200.00	13.00	DEF
> SHIPVAL	Order #861693: Frame (Unshipped Value [200.00])						DEF
> 10ID	Display	1	300.00	0.00	300.00	19.50	DEF
> SHIPVAL	Order #861693: Display (Unshipped Value [300.00])						DEF
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00	3.25	DEF
> SHIPVAL	Order #861693: Unshipped Shipping Cost [50.00]						DEF

Subtotal Tax

Adjustment

Total

Tax Ex DEF

Grand Total

Example B

No Shipment. Tax Rate for ShipTo Address = Florida 6.5%. FEDEX Order Line Item = \$50

Items: **10CDF** (Production Code), **VI** (Installation Code), and **BOSWC** (Packing Code) included in Order.

Summary: The Invoiced Tax Calculations display the Production Order Item with its value and below it is a line with the language “Unshipped Value” with the value that was not shipped in brackets. This value is taxed using the tax rate belonging to the Order’s ShipTo Address jurisdiction, in this case Orlando Florida’s 6.5%.

Also displayed are the Order’s Installation and Packing Items. These are followed by lines with the language

“Unshipped Packing Value” and “Unshipped Install Value” each with a value in brackets.

The Shipping charged to the customer (\$50.00) appears as well as its own line item and below it is a line with the language “Tax on Shipping Mark-Up” with a value in brackets that is calculated as the *sum of shipping item code values in the Order minus the sum of Suggested Shipping Price values* in related Shipping records. In this example, there are no Shipments, so the sum of Suggested Shipping Price values is 0.00. The value in brackets is equal to the Price of the shipping Order Item, and is taxed using the Order’s ShipTo Address jurisdiction.

Record: 1 of 1 New + Edit Delete ✕ Print Actions ⌵

Order: 861712 Testing Company Inc 03/16/2026

OPEN ●

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

Bill To Customer (Bill To) > Contact > **Ship To** 2901 Osceola Pkwy

Testing Company Inc (TEST) John Q Public Testing Company Inc John Q Public

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

House Account Customer PO # Billing Terms Disc % Ship Together Shipping Terms FOB Email Address Notify X

COD JQP@test.com

This order is COD. It is company policy to collect a 50% deposit before beginning work and full payment before final delivery.

Non-Prd Notes Notes for Invoice Invoice Description

Order Items Schedule Override Go to Last Line Item View Ship/Install Lines Only

#	Line Item	Rev	Dept	Line Item Code	Desc.	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit		340-7	> 10CDF	Cust			X	1	1		10.00	0.00	10.00	DEF
2	Submit		490-1	> VI	OS			X	1	1		200.00	0.00	200.00	DEF
3	Submit		410-5	> BOSWC	B-			X	1	1		300.00	0.00	300.00	DEF
4	Submit		710-1	> FEDEX	Fede			X	1	1		50.00	0.00	50.00	DEF

Estimate Provided? Yes No

Sales Lead > Sales Priority Likely Value Fulfillment Fmt Priority Start Date Ship Date Ship Time

Normal 100.00% Normal 03/16/26 03/16/26 7:00 PM

Campaign > Type Route Source Job > Sales Approved to Invoice Order Needs Estimate No Charge

Production --- --- --- 861712

Subtotal	560.00	96%
Adjustment	0.00	
Total	560.00	96%
Tax DEF	36.40	Exempt
Grand Total	596.40	90%
Payment Due	596.40	

Packing [410] 300.00
Shipping [710] 50.00
Installation [490] 200.00
Everything Else 10.00

Record: 1 of 1 New + Edit Delete ✕ Print Actions ⌵

Invoice: 483521 Testing Company Inc 3/16/2026

PENDING ●

Invoice Details Notices Emails Docs

Bill To Customer (Bill To) > Contact > **Description**

Testing Company Inc John Q Public

Recur Transaction > Order > Additional Info

861712 Testing Company Inc

Cust PO # Billing Terms Invoice Due Pmt Expected

COD 03/16/26 03/16/26

Invoice Items Override Tax Calculations

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CDF	Custom Display Fabrication	1	10.00	0.00	10.00		DEF
> SHIPVAL	Order #861712: Custom Display Fabrication (Unshipped Value [10.00])					0.65	DEF
> VI	OS -Vendor Installation	1	0.00	200.00	200.00		DEF
> BOSWC	B- Wood Crating and Packing	1	0.00	300.00	300.00		DEF
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		DEF
> PACKVAL	Order #861712: Unshipped Packing Value [300.00]					19.50	DEF
> SHIPVAL	Order #861712: Tax on Shipping Mark-Up [50.00]					3.25	DEF
> INSTALLVAL	Order #861712: Unshipped Install Value [200.00]					13.00	DEF

Subtotal	560.00	36.40
Adjustment	0.00	0.00
Total	560.00	0.00
Tax Ex DEF	36.40	
Grand Total	596.40	

Example C

Tax Rate for ShipTo Address = Florida 6.5%. **Single Shipment.** SuggShipSalePrice = \$37.50; FEDEX Order Line Item = \$50

Items: **Only Production Order Items, No VI** (Installation Code), and **BOSWC** (Packing Code) included in Order Lines.

Summary: The Invoiced Tax Calculations display the Production Order Items with their values and below them are lines with the language “*Shipment#999999: Production Item Description (Tax on Shipped Value)*”. This is the tax on each Item itself. [In the purple, yellow and green boxes]

Beneath that is a second line connected to each production item with the language “(Shipping Tax Allocated)”. [In the red boxes] The tax on shipping charges is split up over the items within each shipment in the following way: The Shipment’s Suggested Shipping Sale Price is split apart based on the percentage value of the individual Items in the Shipment. Each split amount is taxed using the tax rate belonging to the Shipment’s ShipTo Address jurisdiction, in this case Orlando Florida’s 6.5%.

If there is a difference between the Shipment’s Suggested Shipping Sale Price and the sum of Shipping charges in the Order, a line is added to the Tax Calculation with the language “Tax on Shipping Mark-Up” with a value in brackets that is calculated as the *sum of shipping item code values in the Order minus the sum of Suggested Shipping Price values* in related Shipping records. In this example, there is one Shipment with a Suggested Shipping Price of \$37.50. The value in brackets is equal to the Price of the shipping Order Item \$50 minus \$37.50 [12.50], and is taxed using the Order’s ShipTo Address jurisdiction, in this case Orlando Florida’s 6.5%.

Record: 1 of 1
New + Edit Delete X Print Actions

Order: 861713 Testing Company Inc 03/16/2026 OPEN ●

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

Bill To

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

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

Customer PO # Billing Terms Disc %
 COD

Ship To 2901 Osceola Pkwy

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

Delivery Type Courier Service Courier Account #
Ship Together

Shipping Terms FOB Email Address Notify X
 JQP@test.com

Activities & Comments

This order is COD. It is company policy to collect a 50% deposit before beginning work and full payment before final delivery.

Non-Prd Notes

Notes for Invoice

Invoice Description

Order Items Schedule Override Go to Last Line Item View Ship/Install Lines Only

#	Line Item	Rev	Dept	Line Item Code	Desc.	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit		340-7	> 10CDF	Cust			X	1	1		10.00	0.00	10.00	DEF
2	Submit		420-7	> 10CAF	Fram			X	1	1		200.00	0.00	200.00	DEF
3	Edit		345-5	> 10ID	Displ			X	1	1		300.00	0.00	300.00	DEF
4	Submit		710-1	> FEDEX	Fede			X	1	1		50.00	0.00	50.00	DEF

Estimate Provided?
 Yes No

Lead > Sales Priority Likely Value
 Normal 100.00%

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

Fulfillment

Print Priority Start Date Ship Date Ship Time
 Normal 03/16/26 03/16/26 8:30 PM

Job > Sales Approved to Invoice
 861713

Subtotal 560.00 94%
 Adjustment 0.00
 Total 560.00 94%

Tax DEF 36.38 Exempt
Grand Total 596.38 83%

Payment Due 596.38

Packing [410] 0.00
 Shipping [710] 50.00
 Installation [490] 0.00
 Everything Else 510.00

Record: 1 of 1
New + Edit Delete X Print Actions

Invoice: 483522 Testing Company Inc 3/16/2026 PENDING ●

Invoice Details
Notices Emails Docs

Bill To

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

Recur Transaction > Order >
 861713 Testing Company Inc

Cust PO # Billing Terms Invoice Due Pmt Expected
 COD 03/16/26 03/16/26

Description

Additional Info

Payment Comments

Invoice Items Override Tax Calculations

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CDF	Custom Display Fabrication	1	10.00	0.00	10.00		DEF
> 10CAF	Frame	1	200.00	0.00	200.00		DEF
> 10ID	Display	1	300.00	0.00	300.00		DEF
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		DEF
> SHIPVAL	Shipment #111995: Custom Display Fabrication (Tax on Shipped Value)					0.65	DEF
> SHIP	Shipment #111995: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	0.04	DEF
> SHIPVAL	Shipment #111995: Frame (Tax on Shipped Value)					13.00	DEF
> SHIP	Shipment #111995: Frame (Shipping Tax Allocated)	1	0.00	0.00	0.00	0.95	DEF
> SHIPVAL	Shipment #111995: Display (Tax on Shipped Value)					19.50	DEF
> SHIP	Shipment #111995: Display (Shipping Tax Allocated)	1	0.00	0.00	0.00	1.43	DEF
> SHIPVAL	Order #861713: Tax on Shipping Mark-Up [12.50]					0.81	DEF

Subtotal 560.00 36.38
 Adjustment 0.00 0.00
 Total 560.00 0.00
 Tax Ex DEF 36.38
Grand Total 596.38

Example D

Tax Rate for ShipTo Address = Florida 6.5%. **Single Shipment**. SuggShipSalePrice = \$37.50; FEDEX Line Item = \$50

Items: **10CDF** (Production Code), **VI** (Installation Code), and **BOSWC** (Packing Code) included in Packing List

When a Production Code, Install Code, and Packing Code are all fully "shipped", their values are taxed (green and yellow), and the Shipping Tax is distributed across Production Items (red) + an entry covering the difference between the Shipment's SuggShipPrice and the sum of Shipping Order Items in the Order (black).

Summary: The Invoiced Tax Calculations display the Production Order Items with their values and below them are lines with the language “*Shipment#999999: Production Item Description (Tax on Shipped Value)*”. This is the tax on each Item itself. [In the purple boxes]

Beneath that is a second line connected to each production item with the language “(Shipping Tax Allocated)”. [In the red boxes] The tax on shipping charges is split up over the production items within each shipment in the following way: The Shipment’s Suggested Shipping Sale Price is split apart based on the percentage value of the individual Items in the Shipment. Each split amount is taxed using the tax rate belonging to the Shipment’s ShipTo Address jurisdiction, in this case Orlando Florida’s 6.5%.

If there is a difference between the Shipment’s Suggested Shipping Sale Price and the sum of Shipping charges in the Order, a line is added to the Tax Calculation with the language “Tax on Shipping Mark-Up” with a value in brackets that is calculated as the *sum of shipping item code values in the Order minus the sum of Suggested Shipping Price values* in related Shipping records. In this example, there is one Shipment with a Suggested Shipping Price of \$37.50. The value in brackets is equal to the Price of the shipping Order Item \$50 minus \$37.50 [12.50], and is taxed using the Order’s ShipTo Address jurisdiction, in this case Orlando Florida’s 6.5%. [In the black box]

Installation and Packing Items are each summed together by shipment and taxed on a line with the language “*Shipment#999999: Tax on Packing Value [99.99]*” [In the yellow box] and “*Shipment#999999: Tax on Install Value [99.99]*” [In the green box] respectively. These are taxed using the tax rate belonging to the Shipment’s ShipTo Address jurisdiction, in this case Orlando Florida’s 6.5%.

Record: 1 of 1 New + Edit ✎ Delete ✕ Print 🖨 Actions ↗

Order: 50004-6 Testing Company Inc 03/16/2026 OPEN ●

Production Order Management Job Costs & Approvals Reveal Folder 📁 Notices 📢 Emails ✉ Docs 📄

Bill To

Customer (Bill To) > Contact >

Sales Rep > House Account

Customer PO # Billing Terms Disc %

Ship To 2901 Osceola Pkwy 📄 ↗

Ship To Company > Use Bill To ✕ Ship To Contact >

Delivery Type Courier Service Courier Account #

Ship Together

Shipping Terms FOB Email Address Notify ✕

Activities & Comments

This order is COD. It is company policy to collect a 50% deposit before beginning work and full payment before final delivery.

Non-Prd Notes **Notes for Invoice** **Invoice Description**

#	Line Item	Rev	Dept	Line Item Code	Desc.	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit	340-7	>	10CDF	Cust			✕	1	1		10.00	0.00	10.00	DEF
2	Submit	490-1	>	VI	OS			✕	1	1		200.00	0.00	200.00	DEF
3	Submit	410-5	>	BOSWC	B-			✕	1	1		300.00	0.00	300.00	DEF
4	Submit	710-1	>	FEDEX	Fede			✕	1	1		50.00	0.00	50.00	DEF

Estimate Provided? Yes No

Sales

Lead > Sales Priority Likely Value

Campaign > Type Route Source

Fulfillment

Ffmt Priority Start Date Ship Date Ship Time

Job > Sales Approved to Invoice

Order Needs Estimate No Charge

Subtotal	560.00	96%
Adjustment	0.00	
Total	560.00	96%
Tax DEF	36.40	Exempt
Grand Total	596.40	85%
Payment Due	596.40	

Packing [410]	300.00
Shipping [710]	50.00
Installation [490]	200.00
Everything Else	10.00

Invoices Record: 1 of 1 New + Edit ✎ Delete ✕ Print 🖨 Actions ↗

Invoice: 483523 Testing Company Inc 3/16/2026 PENDING ●

Invoice Details Notices 📢 Emails ✉ Docs 📄

Bill To

Customer (Bill To) > Contact >

Recur Transaction > Order >

Cust PO # Billing Terms Invoice Due Pmt Expected

Description

Additional Info

Payment Comments

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CDF	Custom Display Fabrication	1	10.00	0.00	10.00		DEF
> VI	OS -Vendor Installation	1	0.00	200.00	200.00		DEF
> BOSWC	B- Wood Crating and Packing	1	0.00	300.00	300.00		DEF
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		DEF
> SHIPVAL	Shipment #111996: Custom Display Fabrication (Tax on Shipped Value)					0.65	DEF
> SHIP	Shipment #111996: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	2.44	DEF
> PACKVAL	Shipment #111996: Tax on Packing Value [300.00]					19.50	DEF
> SHIPVAL	Order #50004-6: Tax on Shipping Mark-Up [12.50]					0.81	DEF
> INSTALLVAL	Shipment #111996: Tax on Install Value [200.00]					13.00	DEF

Subtotal	560.00	36.40
Adjustment	0.00	0.00
Total	560.00	0.00
Tax Ex DEF	36.40	
Grand Total	596.40	

Record: 1 of 1 New Edit Delete Print Actions

Shipment: 111996 Testing Company Inc 3/16/2026 SHIPPED

Outgoing Shipment Notices Emails Docs

Shipped To Company > <input type="text" value="Testing Company Inc"/> Contact > <input type="text" value="John Q Public"/> Order > <input type="text" value="50004-6"/> Packing Requirements <input type="text"/> FOB <input type="text"/> Description <input type="text"/> Prod Value <input type="text" value="10.00"/> Pack Value <input type="text" value="300.00"/> Ship Cost <input type="text" value="30.00"/> SugShipPrice <input type="text" value="37.50"/> Install Value <input type="text" value="200.00"/>		Shipment Info <input type="checkbox"/> Purchased Courier Account # <input type="text"/> Courier Service <input type="text" value="FedEx Ground"/> Saturday Delivery <input type="radio"/> Yes <input checked="" type="radio"/> No Package Type <input type="text"/> L <input type="text"/> W <input type="text"/> H <input type="text"/> Weight <input type="text"/> 6 x 6 x 6 Courier Tracking # <input type="text"/> Ship Time <input type="text" value="2:00 PM"/> Ship Date <input type="text" value="03/16/26"/> Package IDs Ref 01 Ref 02 Ref 03		Shipping Address Testing Company Inc John Q Public 2901 Osceola Pkwy Orlando, FL 32830 Phone <input type="text"/> Email Address <input type="text" value="JQP@test.com"/> Notify <input checked="" type="checkbox"/> Duties Payer <input type="text"/> Duties Payer Account # <input type="text"/>	
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Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref #(s)
1	> 10CDF	Custom Display Fabrication		> 50004-6	1	0	#5
2	> VI	OS - Vendor Installation		> 50004-6	1	0	#5
3	> BOSWC	B- Wood Crating and Packing		> 50004-6	1	0	#5

Example E

Tax Rate for ShipTo Address = Florida 6.5%. **Two Shipments.** Tax Rate = Florida 6.5%, and California 7.5%.
 SuggShipSalePrice = \$145.00 each; VAN1 Line Item = \$400

Items: **Only Production Order Items, No VI** (Installation Code), and **BOSWC** (Packing Code) included in Order Lines.

Summary: The Invoiced Tax Calculations display the Production Order Items with their values and below them are lines with the language "Shipment#999999: Production Item Description (Tax on Shipped Value)". This is the tax on each Item itself. [In the purple, yellow and green boxes]

Beneath that is a second line connected to each production item with the language "(Shipping Tax Allocated)". [In the red boxes] The tax on shipping charges is split up over the items within each shipment in the following way: The Shipment's Suggested Shipping Sale Price is split apart based on the percentage value of the individual Items in the Shipment. Each split amount is taxed using the tax rate belonging to the Shipment's ShipTo Address jurisdiction, in this case Anaheim California's 7.75% and Orlando Florida's 6.5%.

If there is a difference between the Shipment's Suggested Shipping Sale Price and the sum of Shipping charges in the Order, a line is added to the Tax Calculation with the language "Tax on Shipping Mark-Up" with a value in brackets that is calculated as the *sum of shipping item code values in the Order minus the sum of Suggested Shipping Price values* in related Shipping records. In this example, there are two Shipments with a Suggested Shipping Price of \$145.00 each. The value in brackets is equal to the Price of the shipping Order Item \$400 minus (\$145 x2) [\$110.00], and is taxed using the Order's ShipTo Address jurisdiction, in this case Orlando Florida's 6.5%.

Record: 2 of 2 New Edit Delete Print Actions

Shipment: 112042 Testing Company Inc 3/19/2026 SHIPPED

Outgoing Shipment Notices Emails Docs

Shipped To Company > <input type="text" value="Testing Company Inc"/> Contact > <input type="text" value="John Q Public"/> Order > <input type="text" value="861732"/> Packing Requirements <input type="text"/> FOB <input type="text"/> Description <input type="text"/> Prod Value <input type="text" value="10.00"/> Pack Value <input type="text" value="0.00"/> Ship Cost <input type="text" value="0.00"/> SugShipPrice <input type="text" value="145.00"/> Install Value <input type="text" value="0.00"/>		Shipment Info <input type="checkbox"/> Purchased Courier Account # <input type="text"/> Courier Service <input type="text" value="Duggal Van"/> Saturday Delivery <input type="radio"/> Yes <input checked="" type="radio"/> No Package Type <input type="text"/> L <input type="text"/> W <input type="text"/> H <input type="text"/> Weight <input type="text"/> 0 x 0 x 0 Courier Tracking # <input type="text"/> Ship Time <input type="text"/> Ship Date <input type="text" value="03/19/26"/> Package IDs Ref 01 Ref 02 Ref 03		Shipping Address Testing Company Inc John Q Public 2901 Osceola Pkwy Orlando, FL 32830 Phone <input type="text" value="(555) 555-5555"/> Email Address <input type="text" value="JQP@test.com"/> Notify <input checked="" type="checkbox"/> Duties Payer <input type="text"/> Duties Payer Account # <input type="text"/>	
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Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref #(s)
1	> 10CDF	Custom Display Fabrication		> 861732	1	0	#5

Record: 1 of 2 New Edit Delete Print Actions

Shipment: 112041 Testing Company Inc 3/19/2026 SHIPPED

Outgoing Shipment Notices Emails Docs

Shipped To

Company > **Testing Company Inc** Contact > **John Q Public**

Order > **861732** Packing Requirements **FOB**

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
500.00	0.00	0.00	145.00	0.00

Shipment Info Purchased

Courier Account # **Duggal Van** Courier Service **Saturday Delivery** Yes No

Package Type **L** W **H** Weight **0**

Courier Tracking # **0** x **0** x **0**

Courier Tracking # **03/19/26** Ship Date

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
John Q Public
1313 Disneyland Dr.
Anaheim, CA 92802

Phone **(555) 555-5555** Email Address **JQP@test.com**

Duties Payer Duties Payer Account #

Packing List

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref # (s)
1	3	10ID	Display	861732	1	0	#5
2	2	10CAF	Frame	861732	1	0	#5

Record: 1 of 2 New Edit Delete Print Actions

Order: 861732 Testing Company Inc 03/19/2026 OPEN

Production Order Reveal Folder Notices Emails Docs

Bill To

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

Sales Rep > **2nd Sales Rep [Acct Mgr]**

House Account

Customer PO # Billing Terms Disc %

COD

Ship To **2901 Oceola Pkwy**

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

Delivery Type Courier Service Courier Account #

Ship Together

Shipping Terms **FOB** Email Address **JQP@test.com** Notify X

Activities & Comments

This order is COD. It is company policy to collect a 50% deposit before beginning work and full payment before final delivery.

Non-Prod Notes **Notes for Invoice** **Invoice Description**

Order Items Schedule Override Go to Last Line Item View Ship/Install Lines Only

#	Line Item	Rev	Dept	Line Item Code	Desc.	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	1	Submit	340-7	> 10CDF	Cust	X		X	1	1		10.00	0.00	10.00	DEF
2	2	Submit	420-7	> 10CAF	Fram	X		X	1	1		200.00	0.00	200.00	DEF
3	3	Edit	345-5	> 10ID	Displ	X		X	1	1		300.00	0.00	300.00	DEF
4	4	Submit	710-1	> VAN1	Broo	X		X	1	2		145.00	55.00	400.00	DEF

Estimate Provided? Yes No

Sales

Lead > Sales Priority **Normal** Likely Value **100.00%**

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

Fulfillment

Print Priority **Normal** Start Date **03/19/26** Ship Date **03/20/26** Ship Time **10:30 PM**

Job > **861732** Sales Approved to Invoice Order Needs Estimate No Charge

Subtotal	910.00	96%
Adjustment	0.00	
Total	910.00	96%
Tax DEF	67.23	Exempt
Grand Total	977.23	90%
Payment Due	977.23	

Packing [410] 0.00
Shipping [710] 400.00
Installation [490] 0.00
Everything Else 510.00

Record: 2 of 2 New Edit Delete Print Actions

Invoice: 483532 Testing Company Inc 03/19/26 PENDING

Invoice Details Notices Emails Docs

Bill To

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

Recur Transaction > **861732 Testing Company Inc**

Cust PO # Billing Terms Invoice Due Pmt Expected

COD **03/19/26** **03/19/26**

Description

Additional Info

Payment Comments

Invoice Items Override Tax Calculations

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CDF	Custom Display Fabrication	1	10.00	0.00	10.00	DEF	
> 10CAF	Frame	1	200.00	0.00	200.00	DEF	
> 10ID	Display	1	300.00	0.00	300.00	DEF	
> VAN1	Brooklyn/Manhattan Small Van Delivery	2	145.00	55.00	400.00	DEF	
> SHIPVAL	Shipment #112041: Display (Tax on Shipped Value)				23.25	DEF	
> SHIP	Shipment #112041: Display (Shipping Tax Allocated) 7.75%	1	0.00	0.00	0.00	6.75	DEF
> SHIPVAL	Shipment #112041: Frame (Tax on Shipped Value)				15.50	DEF	
> SHIP	Shipment #112041: Frame (Shipping Tax Allocated)	1	0.00	0.00	0.00	4.50	DEF
> SHIPVAL	Shipment #112042: Custom Display Fabrication (Tax on Shipped Value) 6.5%				0.65	DEF	
> SHIP	Shipment #112042: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	9.43	DEF
> SHIPVAL	Order #861732: Tax on Shipping Mark-Up [110.00] 6.5%				7.15	DEF	

Subtotal	910.00	67.23
Adjustment	0.00	0.00
Total	910.00	0.00
Tax DEF	67.23	
Grand Total	977.23	

Example F

Tax Rate for ShipTo Address = Florida 6.5%. **Two Shipments**. Tax Rate = Florida 6.5%, and California 7.75%.
 SuggShipSalePrice = \$11.41 each; FEDEX Line Item = \$50

Items: **10CDF** (Production Code), **VI** (Installation Code), and **BOSWC** (Packing Code) included in both Packing Lists

When a Production Code, Install Code, and Packing Code are all fully “shipped”, their values are taxed (green and yellow), and the Shipping Tax is distributed across Production Items (red) + an entry covering the difference between the Shipment’s SuggShipPrice and the sum of Shipping Order Items in the Order (black).

Summary: The Invoiced Tax Calculations display the Production Order Items with their values and below them are lines with the language “*Shipment#999999: Production Item Description (Tax on Shipped Value)*”. This is the tax on each Item itself. [In the purple boxes]

Beneath that is a second line connected to each production item with the language “(Shipping Tax Allocated)”. [In the red boxes] The tax on shipping charges is split up over the production items within each shipment in the following way: The Shipment’s Suggested Shipping Sale Price is split apart based on the percentage value of the individual Items in the Shipment. Each split amount is taxed using the tax rate belonging to the Shipment’s ShipTo Address jurisdiction, in this case Anaheim California’s 7.75% and Orlando Florida’s 6.5%.

If there is a difference between the Shipment’s Suggested Shipping Sale Price and the sum of Shipping charges in the Order, a line is added to the Tax Calculation with the language “Tax on Shipping Mark-Up” with a value in brackets that is calculated as the *sum of shipping item code values in the Order minus the sum of Suggested Shipping Price values* in related Shipping records. In this example, there are two Shipments each with a Suggested Shipping Price of \$11.91. The value in brackets is equal to the Price of the shipping Order Item \$50 minus (\$11.91x2) [\$27.18], and is taxed using the Order’s ShipTo Address jurisdiction, in this case Orlando Florida’s 6.5%. [In the black box]

Installation and Packing Items are each summed together by shipment and taxed on a line with the language “*Shipment#999999: Tax on Packing Value [99.99]*” [In the yellow box] and “*Shipment#999999: Tax on Install Value [99.99]*” [In the green box] respectively. These are taxed using the tax rate belonging to each Shipment’s ShipTo Address jurisdiction, in this case Anaheim California’s 7.75% and Orlando Florida’s 6.5%.

Shipment: 112050 Testing Company Inc 3/24/2026 SHIPPED

Notices Emails Docs

Shipped To

Company > **Testing Company Inc**
 Contact > **John Q Public**

Order > **861734**
 Packing Requirements: FOB:

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
10.00	300.00	9.13	11.41	200.00

Shipment Info Purchased

Courier Account # Courier Service **FedEx Ground** Yes No Saturday Delivery

Package Type L: W: H: Weight:

Package 6 x 6 x 6 6

Courier Tracking # **399907013128** Ship Time **2:00 PM** Ship Date **03/24/26**

Package IDs: Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
John Q Public
 1313 Disneyland Dr.
 Anaheim, CA 92802

Phone: **(555) 555-5555** Email Address: **JQP@test.com**

Duties Payer: Duties Payer Account #:

Packing List

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref # (s)
1	> 10CDF	Custom Display Fabrication		> 861734	1	0	#s
2	> VI	OS -Vendor Installation		> 861734	1	0	#s
3	> BOSWC	B- Wood Crating and Packing		> 861734	1	0	#s

Shipment: 112051 Testing Company Inc 3/24/2026

SHIPPED

Outgoing Shipment

Notices Emails Docs

Shipped To

Company > Contact >
 Testing Company Inc John Q Public
 Order > Packing Requirements FOB
 861734
 Description

Prod Value	Pack Value	Ship Cost	SupShipPrice	Install Value
10.00	300.00	9.13	11.41	200.00

Shipment Info Purchased

Courier Account # Courier Service Saturday Delivery Yes No
 Package Type L W H Weight
 Package 6 x 6 x 6 6
 Courier Tracking # Ship Time Ship Date
 399907013128 2:00 PM 03/24/26

Package IDs	Ref 01	Ref 02	Ref 03
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Shipping Address

Testing Company Inc
 John Q Public
 2901 Osceola Pkwy
 Orlando, FL 32830
 Phone Email Address Notify
 (555) 555-5555 JQP@test.com
 Duties Payer Duties Payer Account #

Packing List

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref # (s)
1	> 10CDF	Custom Display Fabrication		> 861734	1	0	# %
2	> VI	OS -Vendor Installation		> 861734	1	0	# %
3	> BOSWC	B- Wood Crating and Packing		> 861734	1	0	# %

Order: 861734 Testing Company Inc 03/24/2026 OPEN

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

Bill To

Customer (Bill To) > **Testing Company Inc (TEST)**
 Contact > **John Q Public**
 Sales Rep > **2nd Sales Rep [Acct Mgr]**
 House Account > **Customer PO #** **Billing Terms** **Disc %**
COD

Ship To *2901 Osceola Pkwy*

Ship To Company > **Testing Company Inc** | Use Bill To x | Ship To Contact > **John Q Public**
 Delivery Type > **Courier Service** | Courier Account #
Ship Together
 Shipping Terms > **FOB** | Email Address > **JQP@test.com** | Notify x

Activities & Comments

This order is COD. It is company policy to collect a 50% deposit before beginning work and full payment before final delivery.

Non-Prd Notes | **Notes for Invoice** | **Invoice Description**

Order Items	Schedule	Override	Go to Last Line Item	View Ship/Install Lines Only											
#	Line Item	Rev	Dept	Line Item Code	Desc	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	1	Submit	340-7	> 10CDF	Custom			x	1	2		10.00	0.00	20.00	DEF
2	2	Submit	490-1	> VI	OS			x	1	2		200.00	0.00	400.00	DEF
3	3	Submit	410-5	> BOSWC	B-			x	1	2		300.00	0.00	600.00	DEF
4	4	Submit	710-1	> FEDEX	Fedex			x	1	1		50.00	0.00	50.00	DEF

Estimate Provided?
 Yes No

Sales

Lead > **Normal** | Sales Priority | Likely Value **100.00%**

Campaign > **Production** | Type | Route | Source

Fulfillment

Print Priority **Normal** | Start Date **03/24/26** | Ship Date **03/24/26** | Ship Time **5:30 PM**

Job > **861734** | Sales Approved to Invoice
 Order Needs Estimate
 No Charge

Subtotal **1,070.00** | 97%
 Adjustment **0.00**
 Total **1,070.00** | 97%
 Tax **DEF** **76.07** | Exempt
Grand Total 1,146.07 | 89%
 Payment Due **1,146.07**

Packing [410] **600.00**
 Shipping [710] **50.00**
 Installation [490] **400.00**
 Everything Else **20.00**

Invoices

Record: 1 of 1 | [New](#) | [Edit](#) | [Delete](#) | [Print](#) | [Actions](#)

Invoice: 483537 | **Testing Company Inc** | **03/24/26** | **PENDING**

[Notices](#) | [Emails](#) | [Docs](#)

Bill To

Customer (Bill To) > **Testing Company Inc**
 Contact > **John Q Public**
 Recur Transaction > **861734 Testing Company Inc**
 Cust PO # **Invoice Due** **Pmt Expected**
COD **03/24/26** **03/24/26**

Description

Additional Info

Payment Comments

Invoice Items	Override	Tax Calculations					
Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CDF	Custom Display Fabrication	2	10.00	0.00	20.00	DEF	
> VI	OS -Vendor Installation	1	0.00	400.00	400.00	DEF	
> BOSWC	B- Wood Crating and Packing	1	0.00	600.00	600.00	DEF	
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00	DEF	
> SHIPVAL	Shipment #112050: Custom Display Fabrication (Tax on Shipped Value)				0.78	DEF	
> SHIP	Shipment #112050: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	DEF	
> SHIPVAL	Shipment #112051: Custom Display Fabrication (Tax on Shipped Value)				0.65	DEF	
> SHIP	Shipment #112051: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	DEF	
> PACKVAL	Shipment #112050: Tax on Packing Value [300.00]				23.25	DEF	
> PACKVAL	Shipment #112051: Tax on Packing Value [300.00]				19.50	DEF	
> SHIPVAL	Order #861734: Tax on Shipping Mark-Up [27.18]				1.77	DEF	
> INSTALLVAL	Shipment #112050: Tax on Install Value [200.00]				15.50	DEF	
> INSTALLVAL	Shipment #112051: Tax on Install Value [200.00]				13.00	DEF	

Subtotal **1,070.00** | 76.07
 Adjustment **0.00**
 Total **1,070.00** | 0.00
 Tax **DEF** **76.07**
Grand Total 1,146.07

If the Shipments remained marked Pending or only Transmitted, and the Order was then prematurely Invoiced, the Invoice's tax calculations would be tabulated as if the Shipments did not exist and the Order's Ship To Address would be used for the Sales Tax nexus.

Record: 1 of 1 New Edit Delete Print Actions

Invoice: 483536 **Testing Company Inc** **03/24/26** **PENDING**

Invoice Details Notices Emails Docs

Bill To **Description** **Payment Comments**

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

Recur Transaction > Order >
 861734 Testing Company Inc

Cust PO # Billing Terms Invoice Due Pmt Expected
 COD 03/24/26 03/24/26

Additional Info

Invoice Items **Override** **Tax Calculations**

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CDF	Custom Display Fabrication	2	10.00	0.00	20.00		DEF
> SHIPVAL	Order #861734: Custom Display Fabrication (Unshipped Value [20.00])					1.30	DEF
> VI	OS -Vendor Installation	1	0.00	400.00	400.00		DEF
> BOSWC	B- Wood Crating and Packing	1	0.00	600.00	600.00		DEF
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		DEF
> PACKVAL	Order #861734: Unshipped Packing Value [600.00]					39.00	DEF
> SHIPVAL	Order #861734: Tax on Shipping Mark-Up [50.00]					3.25	DEF
> INSTALLVAL	Order #861734: Unshipped Install Value [400.00]					26.00	DEF

Subtotal	1,070.00	69.55
Adjustment	0.00	0.00
Total	1,070.00	0.00
Tax Ex DEF	69.55	
Grand Total	1,139.55	

Example G

Tax Rate for ShipTo Address = NYC 8.875%. **Two Shipments**. Tax Rate = Hawaii 4.5%, and California 7.5%.
 SuggShipSalePrice = \$12.16 for each; FEDEX Line Item = \$50

Items: **10CDF** (Production Code), **VI** (Installation Code), and **BOSWC** (Packing Code) included in both Packing Lists

Not All Items are in Packing Lists.

Summary: The Invoiced Tax Calculations display the Production Order Items with their values and below them a line with the language “Unshipped Value” with the value that was not shipped in brackets. This value is applied to the tax rate belonging to the Order’s ShipTo Address jurisdiction, in this case NYC’s 8.875%.

Further below are lines with the language “*Shipment#999999: Production Item Description (Tax on Shipped Value)*”. This is the tax on each shipped Item itself. [In the purple boxes]

Beneath that is a second line connected to each shipped production item with the language “(Shipping Tax Allocated)”. [In the red boxes] The tax on shipping charges is split up over the production items within each shipment in the following way: The Shipment’s Suggested Shipping Sale Price is split apart based on the percentage value of the individual Items in the Shipment. Each split amount is taxed using the tax rate belonging to the Shipment’s ShipTo Address jurisdiction, in this case Anaheim California’s 7.75% and Hawaii’s 4.5%.

If there is a difference between the Shipment’s Suggested Shipping Sale Price and the sum of Shipping charges in the Order, a line is added to the Tax Calculation with the language “Tax on Shipping Mark-Up” with a value in brackets that is calculated as the *sum of shipping item code values in the Order minus the sum of Suggested Shipping Price values* in related Shipping records. In this example, there are two Shipments each with a Suggested Shipping Price of \$15.20. The value in brackets is equal to the Price of the shipping Order Item \$50 minus (\$15.20x2) [\$19.60], and is taxed using the Order’s ShipTo Address jurisdiction, in this case NYC’s 8.875%. [In the black box]

Installation and Packing Items are each summed together by shipment and taxed on a line with the language “*Shipment#999999: Tax on Packing Value [99.99]*” [In the yellow box] and “*Shipment#999999: Tax on Install Value [99.99]*” [In the green box] respectively. These are taxed using the tax rate belonging to each Shipment’s ShipTo Address jurisdiction, in this case Anaheim California’s 7.75% and Hawaii’s 4.5%.

Lines for Packing and Installation Items that were not put into a Shipment are summed in a line containing the

language “Unshipped Packing Value” and “Unshipped Install Value” respectively, each with a value in brackets. These are taxed using the Order’s ShipTo Address jurisdiction, in this case NYC’s 8.875%.

Shipment: 112053 Testing Company Inc 3/25/2026 SHIPPED

Outgoing Shipment Notices Emails Docs

Shipped To

Company > Contact >
Testing Company Inc **John Q Public**
 Order > Packing Requirements FOB
861736
 Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
10.00	300.00	12.16	15.20	200.00

Shipment Info Purchased

Courier Account # Courier Service Saturday Delivery Yes No
FedEx Ground
 Package Type L W H Weight
Package 5 x 5 x 5
 Courier Tracking # Ship Time Ship Date
399942420545 **2:00 PM** **03/25/26**
 Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
John Q Public
92-1185 Allinui Dr
Kapolei, HI 96707
 Phone Email Address Notify
(555) 555-5555 **JQP@test.com**
 Duties Payer Duties Payer Account #

Packing List

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref # (s)
1	> 10CDF	Custom Display Fabrication		> 861736	1	0	#s
2	> BOSWC	B- Wood Crating and Packing		> 861736	1	0	#s
3	> VI	OS -Vendor Installation		> 861736	1	0	#s

Shipment: 112054 Testing Company Inc 3/25/2026 SHIPPED

Outgoing Shipment Notices Emails Docs

Shipped To

Company > Contact >
Testing Company Inc **John Q Public**
 Order > Packing Requirements FOB
861736
 Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
10.00	300.00	12.16	15.20	200.00

Shipment Info Purchased

Courier Account # Courier Service Saturday Delivery Yes No
FedEx Ground
 Package Type L W H Weight
Package 5 x 5 x 5
 Courier Tracking # Ship Time Ship Date
399942420545 **2:00 PM** **03/25/26**
 Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company
Jane Doe
1313 Disneyland Dr.
Ste 234
Anaheim, CA 92802
 Phone Email Address Notify
(555) 555-5555 **JQP@test.com**
 Duties Payer Duties Payer Account #

Packing List

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref # (s)
1	> 10CDF	Custom Display Fabrication	note 1	> 861736	1	0	#s
2	> VI	OS -Vendor Installation	note 2	> 861736	1	0	#s
3	> BOSWC	B- Wood Crating and Packing	note 3	> 861736	1	0	#s

Order: 861736 Testing Company Inc 03/25/2026 OPEN

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

Bill To

Customer (Bill To) > Contact >

Sales Rep > House Account >

Customer PO # > Billing Terms > Disc % >

Ship To 100 Broadway

Ship To Company > Use Bill To > Ship To Contact >

Delivery Type > Courier Account # >

Ship Together >

Shipping Terms > Email Address > Notify >

Activities & Comments

This order is COD. It is company policy to collect a 50% deposit before beginning work and full payment before final delivery.

Non-Prd Notes > Notes for Invoice > Invoice Description >

#	Line Item	Rev	Dept	Line Item Code	Desc.	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit		340-7	> 10CDF	Cust			✗	3	1		10.00	0.00	30.00	DEF
2	Submit		490-1	> VI	OS			✗	3	1		200.00	0.00	600.00	DEF
3	Submit		410-5	> BOSWC	B-			✗	3	1		300.00	0.00	900.00	DEF
4	Submit		710-1	> FEDEX	Fede			✗	1	1		50.00	0.00	50.00	DEF

Estimate Provided? Yes No

Sales > Fulfillment >

Subtotal	1,580.00	97%
Adjustment	0.00	
Total	1,580.00	97%
Tax DEF	111.35	Exempt 90%
Grand Total	1,691.35	

Record: 1 of 1 | [New](#) | [Edit](#) | [Delete](#) | [Print](#) | [Actions](#)

Invoice: 483539 | **Testing Company Inc** | **03/25/26** | **PENDING**

Invoice Details | [Notices](#) | [Emails](#) | [Docs](#)

Bill To

Customer (Bill To) > Contact >

Recur Transaction >

Cust PO # > Billing Terms > Invoice Due > Pmt Expected >

Description

Payment Comments

Additional Info

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CDF	Custom Display Fabrication	3	10.00	0.00	30.00		DEF
> SHIPVAL	Order #861736: Custom Display Fabrication (Unshipped Value [10.00])					0.89	DEF
> VI	OS - Vendor Installation	1	0.00	600.00	600.00		DEF
> BOSWC	B- Wood Crating and Packing	1	0.00	900.00	900.00		DEF
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		DEF
> SHIPVAL	Shipment #112053: Custom Display Fabrication (Tax on Shipped Value)					0.45	DEF
> SHIP	Shipment #112053: Custom Display Fabrication (Shipping Tax Allocated)					0.69	DEF
> SHIPVAL	Shipment #112054: Custom Display Fabrication (Tax on Shipped Value)					0.78	DEF
> SHIP	Shipment #112054: Custom Display Fabrication (Shipping Tax Allocated)					1.18	DEF
> PACKVAL	Order #861736: Unshipped Packing Value [300.00]					26.63	DEF
> PACKVAL	Shipment #112053: Tax on Packing Value [300.00]					13.50	DEF
> PACKVAL	Shipment #112054: Tax on Packing Value [300.00]					23.25	DEF
> SHIPVAL	Order #861736: Tax on Shipping Mark-Up [19.60]					1.73	DEF
> INSTALLVAL	Order #861736: Unshipped Install Value [200.00]					17.75	DEF
> INSTALLVAL	Shipment #112053: Tax on Install Value [200.00]					9.00	DEF
> INSTALLVAL	Shipment #112054: Tax on Install Value [200.00]					15.50	DEF

Subtotal	1,580.00	111.35
Adjustment	0.00	0.00
Total	1,580.00	0.00
Tax Ex DEF	111.35	
Grand Total	1,691.35	

Example H

Tax Rate for ShipTo Address = NYC 8.875%. **Two Shipments.** Tax Rate = Hawaii 4.5%, and California 7.5%. SuggShipSalePrice = \$13.30 for each; FEDEX Line Item = \$26.60

Items: **10CDF** (Production Code), **VI** & **DSI** (Installation Codes), and **BOSWC** & **WHP** (Packing Codes) included in Packing Lists

Not All Items are in Packing Lists.

Summary: The Invoiced Tax Calculations display the Production Order Items with their values. In this example all production Items were assigned to a Shipment, so there is no line with the language “Unshipped Value” with the value that was not shipped in brackets.

For each production Item per Shipment is a line with the language “*Shipment#999999: Production Item Description (Tax on Shipped Value)*”. This is the tax on each shipped Item itself. [In the purple boxes]

Beneath that is a second line connected to each shipped production item with the language “(Shipping Tax Allocated)”. [In the red boxes] The tax on shipping charges is split up over the production items within each shipment in the following way: The Shipment’s Suggested Shipping Sale Price is split apart based on the percentage value of the individual Items in the Shipment. Each split amount is taxed using the tax rate belonging to the Shipment’s ShipTo Address jurisdiction, in this case Anaheim California’s 7.75% and Hawaii’s 4.5%.

In this example, the sum of the Shipments’ Suggested Shipping Sale Price and the sum of Shipping charges in the Order are equal (\$13.30x2 = \$26.60) so there is no line added to the Tax Calculation with the language “Tax on Shipping Mark-Up”. The entire \$26.60 is taxed under the two Production lines (13.30 @7.75% and 13.30 @4.5%).

Installation and Packing Items are each summed together by shipment and taxed on a line with the language “*Shipment#999999: Tax on Packing Value [99.99]*” [In the yellow box] and “*Shipment#999999: Tax on Install Value [99.99]*” [In the green box] respectively. These are taxed using the tax rate belonging to each Shipment’s ShipTo Address jurisdiction, in this case Anaheim California’s 7.75% and Hawaii’s 4.5%.

Lines for Packing and Installation Items that were not put into a Shipment are summed in a line containing the language “Unshipped Packing Value” and “Unshipped Install Value” respectively, each with a value in brackets. These are taxed using the Order’s ShipTo Address jurisdiction, in this case NYC’s 8.875%.

Shipment: 112055 Testing Company Inc 3/26/2026 SHIPPED

Outgoing Shipment Notices | Emails | Docs

Shipped To

Company > **Testing Company Inc** | Contact > **John Q Public**

Order > **861737** | Packing Requirements | FOB

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
20.00	600.00	10.64	13.30	400.00

Shipment Info NFRG | Purchased

Courier Account # | Courier Service **FedEx Ground** | Saturday Delivery Yes No

Package Type | L | W | H | Weight

Package | 6 | x | 6 | x | 6 | 6

Courier Tracking # **399979665164** | Ship Time **2:00 PM** | Ship Date **03/26/26**

Package IDs | Ref 01 | Ref 02 | Ref 03

Shipping Address

Testing Company Inc
John Q Public
92-1185 Alinui Dr
Kapolei, HI 96707

Phone | Email Address | Notify x

(555) 555-5555 | **JQP@test.com**

Duties Payer | Duties Payer Account #

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref # (s)
1	> 10CDF	Custom Display Fabrication	Note A	> 861737	2	0	#5
2	> VI	OS -Vendor Installation	Note B	> 861737	2	0	#5
3	> BOSWC	B- Wood Crating and Packing	Note C	> 861737	2	0	#5

Shipment: 112056 Testing Company Inc 3/26/2026 SHIPPED

Outgoing Shipment Notices | Emails | Docs

Shipped To

Company > **Testing Company Inc** | Contact > **John Q Public**

Order > **861737** | Packing Requirements | FOB

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
10.00	400.00	10.64	13.30	550.00

Shipment Info NFRG | Purchased

Courier Account # | Courier Service **FedEx Ground** | Saturday Delivery Yes No

Package Type | L | W | H | Weight

Package | 6 | x | 6 | x | 6 | 6

Courier Tracking # **399979665164** | Ship Time **2:00 PM** | Ship Date **03/26/26**

Package IDs | Ref 01 | Ref 02 | Ref 03

Shipping Address

Testing Company Inc
John Q Public
1313 Disneyland Dr
Anaheim, CA 92802

Phone | Email Address | Notify x

(555) 555-5555 | **JQP@test.com**

Duties Payer | Duties Payer Account #

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref # (s)
1	> 10CDF	Custom Display Fabrication		> 861737	1	0	#5
2	> VI	OS -Vendor Installation		> 861737	1	0	#5
3	> BOSWC	B- Wood Crating and Packing		> 861737	1	0	#5
4	> WHP	Westhampton Packing and Fulfillment		> 861737	1	0	#5
5	> DSI	Installation		> 861737	1	0	#5

Order: 861737 Testing Company Inc 03/26/2026

OPEN

Production Order Management Job Costs & Approvals

Reveal Folder Notices Emails Docs

Bill To

Customer (Bill To) > **Testing Company Inc (TEST)**
 Contact > **John Q Public**
 Sales Rep > **House Account**
 2nd Sales Rep [Acct Mgr] > **Customer PO #** **Billing Terms** **Disc %**
COD

Ship To 100 Broadway

Ship To Company > Use Bill To > Ship To Contact >
Testing Company Inc **John Q Public**
 Delivery Type Courier Service Courier Account #
Ship Together
 Shipping Terms FOB Email Address Notify >
JQP@test.com

Activities & Comments

This order is COD. It is company policy to collect a 50% deposit before beginning work and full payment before final delivery.

Non-Prd Notes **Notes for Invoice** **Invoice Description**

Order Items	Schedule	Override	Go to Last Line Item	View Ship/Install Lines Only																
#	Line Item	Rev	Dept	Line Item Code	Desc.	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax					
1	Submit	340-7	>	10CDF	Custom			X	3	1		10.00	0.00	30.00	DEF					
2	Submit	490-1	>	VI	OS			X	3	1		200.00	0.00	600.00	DEF					
3	Submit	410-5	>	BOSWC	B- Wood			X	3	1		300.00	0.00	900.00	DEF					
4	Submit	410-0	>	WHP	Westhamp			X	2	1		100.00	0.00	200.00	DEF					
5	Submit	490-1	>	DSI	Installatio			X	2	1		350.00	0.00	700.00	DEF					
6	Submit	710-1	>	FEDEX	Fedex			X	1	1		26.60	0.00	26.60	DEF					

Estimate Provided? Yes No

Sales Lead > Sales Priority: Normal Likely Value: 100.00%

Fulfillment Ffmt Priority: Normal Start Date: 03/26/26 Ship Date: 03/27/26 Ship Time: 8:30 PM

Subtotal: 2,456.60 Tax: 161.88 Grand Total: 2,618.48

Record: 1 of 1 Invoices

Invoice: 483540 Testing Company Inc 03/26/26 PENDING

Invoice Details Notices Emails Docs

Bill To Testing Company Inc John Q Public

Description

Payment Comments

Additional Info

Cust PO # Billing Terms Invoice Due Pmt Expected
 COD 03/26/26 03/26/26

Invoice Items	Override	Tax Calculations																		
Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile													
> 10CDF	Custom Display Fabrication	3	10.00	0.00	30.00		DEF													
> VI	OS -Vendor Installation	1	0.00	600.00	600.00		DEF													
> BOSWC	B- Wood Crating and Packing	1	0.00	900.00	900.00		DEF													
> WHP	Westhampton Packing and Fulfillment	1	0.00	200.00	200.00		DEF													
> DSI	Installation	1	0.00	700.00	700.00		DEF													
> FEDEX	Fedex Shipping	1	26.60	0.00	26.60		DEF													
> SHIPVAL	Shipment #112055: Custom Display Fabrication (Tax on Shipped Value)	4.5%				0.90	DEF													
> SHIP	Shipment #112055: Custom Display Fabrication (Shipping Tax Allocated)	4.5%				0.60	DEF													
> SHIPVAL	Shipment #112056: Custom Display Fabrication (Tax on Shipped Value)	7.75%				0.78	DEF													
> SHIP	Shipment #112056: Custom Display Fabrication (Shipping Tax Allocated)	7.75%				1.03	DEF													
> PACKVAL	Order #861737: Unshipped Packing Value [100.00]	8.875%				8.88	DEF													
> PACKVAL	Shipment #112055: Tax on Packing Value [600.00]	4.5%				27.00	DEF													
> PACKVAL	Shipment #112056: Tax on Packing Value [400.00]	7.75%				31.00	DEF													
> INSTALLVAL	Order #861737: Unshipped Install Value [350.00]	8.875%				31.06	DEF													
> INSTALLVAL	Shipment #112055: Tax on Install Value [400.00]	4.5%				18.00	DEF													
> INSTALLVAL	Shipment #112056: Tax on Install Value [550.00]	7.75%				42.63	DEF													

Subtotal: 2,456.60 Tax: 161.88 Grand Total: 2,618.48