

Tax Calculation Examples

Last Modified on 05/22/2026 12:05 am EDT

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: 3 of 4
New Edit Delete Print Actions

Order: 861847 Testing Company Inc 05/19/2026 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 >
 Customer PO # >
 Billing Terms **COD** Disc % >
 Non-Prd Notes

Ship To 2901 Osceola Pkwy

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

Notes for Invoice

Activities & Comments

Invoice Description

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

Order Items Schedule Shipping 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	420-7	> 10CAF	Custom Artisan Frames			X	1	1		100.00	0.00	100.00	AVA
2	2	Submit	340-7	> 10CDF	Custom Display Fabrication			X	1	1		100.00	0.00	100.00	AVA
3	3	Edit	1 345-5	> 10ID	Interactive Display			X	1	1		100.00	0.00	100.00	AVA
4	4	Submit	710-1	> FEDEX	Fedex Shipping			X	1	1		50.00	0.00	50.00	AVA

Estimate Provided? Yes No

Sales

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

Fulfillment

Ffmt Priority **Normal** Start Date **05/19/26** Ship Date **05/19/26** Ship Time **9:30 AM**
 Job > **861847** Sales Approved to Invoice
 Order Needs Estimate
 No Charge

Subtotal	350.00	90%
Adjustment	0.00	
Total	350.00	90%
Tax AVA	22.75	Exempt
Grand Total	372.75	85%
Payment Due	372.75	

Packing [410]	0.00
Shipping [710]	50.00
Installation [490]	0.00
Everything Else	300.00

Record: 1 of 1 New Edit Delete Print Actions

Invoice: 483617 **Testing Company Inc** **05/19/26** **PENDING**

Invoice Details Notices Emails Docs

Bill To

Customer (Bill To) > **Testing Company Inc**
 Contact > **John Q Public**
 Recur Transaction > **861847 Testing Company Inc**
 Order > **861847 Testing Company Inc**

Cust PO # Billing Terms **COD** Invoice Due **05/19/26** Pmt Expected **05/19/26**

Description

Additional Info

Payment Comments

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CAF	Custom Artisan Frames	1	100.00	0.00	100.00		AVA
> SHIPVAL	Order #861847: Custom Artisan Frames (Unshipped Value [100.00])					6.50	AVA
> 10CDF	Custom Display Fabrication	1	100.00	0.00	100.00		AVA
> SHIPVAL	Order #861847: Custom Display Fabrication (Unshipped Value [100.00])					6.50	AVA
> 10ID	Interactive Display	1	100.00	0.00	100.00		AVA
> SHIPVAL	Order #861847: Interactive Display (Unshipped Value [100.00])					6.50	AVA
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		AVA
> SHIPVAL	Order #861847: Tax on Shipping Mark-Up [50.00]					3.25	AVA
					Subtotal	350.00	22.75
					Adjustment	0.00	0.00
					Total	350.00	0.00
					Tax Ex <input type="checkbox"/>	AVA	22.75
					Grand Total	372.75	

Example B

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

Items: **10CAF** (Production Code), **DSI** (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: 4 of 5 New + Edit Delete X Print Actions

Order: 861848 Testing Company Inc 05/19/2026 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: **COD** Disc %

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

#	Line Item	Rev	Dept	Line Item Code	Desc.	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit	420-7	>	10CAF	Custom Artisan Frames			X	1	1		100.00	0.00	100.00	AVA
2	Submit	410-5	>	BOSWC	Wood Crate			X	1	1		100.00	0.00	100.00	AVA
3	Submit	490-1	>	DSI	Installation			X	1	1		150.00	0.00	150.00	AVA
4	Submit	710-1	>	FEDEX	Fedex Shipping			X	1	1		50.00	0.00	50.00	AVA

Estimate Provided?
 Yes No

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

Fulfillment
 Fmt Priority: **Normal** Start Date: **05/19/26** Ship Date: **05/19/26** Ship Time: **7:00 PM**
 Job > **861848** Sales Approved to Invoice
 Order Needs Estimate
 No Charge

Subtotal	400.00	95%
Adjustment	0.00	
Total	400.00	95%
Tax AVA	26.00	Exempt
Grand Total	426.00	89%
Payment Due	426.00	

Packing [410] 100.00
 Shipping [710] 50.00
 Installation [490] 150.00
 Everything Else 100.00

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

Invoice: 483618 Testing Company Inc 05/19/26 PENDING

Invoice Details Notices Emails Docs

Bill To

Customer (Bill To) > **Testing Company Inc**
 Contact > **John Q Public**
 Recur Transaction > Order > **861848 Testing Company Inc**
 Cust PO # Billing Terms Invoice Due Pmt Expected
 --- COD 05/19/26 05/19/26

Description

Additional Info

Payment Comments

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CAF	Custom Artisan Frames	1	100.00	0.00	100.00	6.50	AVA
> SHIPVAL	Order #861848: Custom Artisan Frames (Unshipped Value [100.00])						
> BOSWC	Wood Crate	1	100.00	0.00	100.00	3.25	AVA
> DSI	Installation	1	150.00	0.00	150.00	9.75	AVA
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		AVA
> PACKVAL	Order #861848: Unshipped Packing Value [100.00]					6.50	AVA
> SHIPVAL	Order #861848: Tax on Shipping Mark-Up [50.00]					3.25	AVA
> INSTALLVAL	Order #861848: Unshipped Install Value [150.00]					9.75	AVA

Subtotal	400.00	26.00
Adjustment	0.00	0.00
Total	400.00	0.00
Tax Ex AVA	26.00	
Grand Total	426.00	

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 and the Order contains a shipping item with a price of \$37.50. So there is no "Tax on Shipping Mark-Up" line.

Record: 7 of 8

Order: 861851 Testing Company Inc 05/19/2026 OPEN

Production Order | Management | Job Costs & Approvals

Ship To: 2901 Osceola Pkwy

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

Ship To: Testing Company Inc | Contact: John Q Public

Delivery Type: Courier Service | Courier Account #

Ship Together

Shipping Terms: FOB | Email Address: JQP@test.com | Notify

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

#	Line Item	Rev	Dept	Line Item Code	Desc.	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax
1	Submit		420-7	> 10CAF	Custom Artisan Frames			X	1	1		100.00	0.00	100.00	AVA
2	Submit		340-7	> 10CDF	Custom Display Fabrication			X	1	1		100.00	0.00	100.00	AVA
3	Edit		345-5	> 10ID	Interactive Display			X	1	1		100.00	0.00	100.00	AVA
4	Submit		710-1	> FEDEX	Fedex Shipping			X	1	1		37.50	0.00	37.50	AVA

Estimate Provided? Yes No

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

Campaign > Type: Production | Route: --- | Source: ---

Fulfillment: Fmt Priority: Normal | Start Date: 05/19/26 | Ship Date: 05/19/26 | Ship Time: 7:00 PM

Job > 861851 | Sales Approved to Invoice: | Order Needs Estimate: | No Charge:

Subtotal	337.50	90%
Adjustment	0.00	
Total	337.50	90%
Tax AVA	21.94	Exempt
Grand Total	359.44	84%
Payment Due	359.44	

Packing [410]	0.00
Shipping [710]	37.50
Installation [490]	0.00
Everything Else	300.00

Record: 1 of 1

Shipment: 112421 Testing Company Inc 5/19/2026 SHIPPED

Outgoing Shipment

Shipped To: Testing Company Inc | Contact: John Q Public

Shipment Info: Courier Account #: FedEx Ground | Saturday Delivery: Yes No

Shipping Address: Testing Company Inc | John Q Public | 2901 Osceola Pkwy | Orlando, FL 32830

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

Prod Value: 300.00 | Pack Value: 0.00 | Ship Cos: 25.00 | **SugShipPrice: 37.50** | Install Value: 0.00

Line Item	Line Item Code	Description	Order	Quantity	Weight	Ref # (s)
3	> 10ID	Interactive Display	> 861851	1	0	#s
2	> 10CDF	Custom Display Fabrication	> 861851	1	0	#s
1	> 10CAF	Custom Artisan Frames	> 861851	1	0	#s

Record: 1 of 1 New Edit Delete Print Actions

Invoice: 483621 **Testing Company Inc** **05/19/26** **PENDING**

Invoice Details Notices Emails Docs

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

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

Recur Transaction > Order >
 861851 Testing Company Inc

Cust PO # Billing Terms Invoice Due Pmt Expected
 COD 05/19/26 05/19/26

Additional Info

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

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CAF	Custom Artisan Frames	1	100.00	0.00	100.00		AVA
> 10CDF	Custom Display Fabrication	1	100.00	0.00	100.00		AVA
> 10ID	Interactive Display	1	100.00	0.00	100.00		AVA
> FEDEX	Fedex Shipping	1	37.50	0.00	37.50		AVA
> SHIPVAL	Shipment #112421: Interactive Display (Tax on Shipped Value)					6.50	AVA
> SHIP	Shipment #112421: Interactive Display (Shipping Tax Allocated)	1	0.00	0.00	0.00	0.81	AVA
> SHIPVAL	Shipment #112421: Custom Display Fabrication (Tax on Shipped Value)					6.50	AVA
> SHIP	Shipment #112421: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	0.81	AVA
> SHIPVAL	Shipment #112421: Custom Artisan Frames (Tax on Shipped Value)					6.50	AVA
> SHIP	Shipment #112421: Custom Artisan Frames (Shipping Tax Allocated)	1	0.00	0.00	0.00	0.81	AVA

Subtotal 337.50 21.93

Adjustment 0.00 0.00

Total 337.50 0.00

Tax Ex AVA 21.93

Grand Total **359.43**

Example D1

Tax Rate for ShipTo Address = Florida 6.5%. **Single Shipment**. SuggShipSalePrice = \$37.50; FEDEX Line Item = \$50
 Items: **10CAF** (Production Code), **DSI**(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: 6 of 7 New + Edit Edit Delete X Print Actions

Order: 861850 Testing Company Inc 05/19/2026 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 Notify X
JQP@test.com

Activities & Comments

Non-Prd Notes

Notes for Invoice

Invoice Description

Order Items Schedule Shipping 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		420-7	> 10CAF	Custom Artisan Frames			X	1	1		100.00	0.00	100.00	AVA
2	Submit		410-5	> BOSWC	Wood Crate			X	1	1		100.00	0.00	100.00	AVA
3	Submit		490-1	> DSI	Installation			X	1	1		150.00	0.00	150.00	AVA
4	Submit		710-1	> FEDEX	Fedex Shipping			X	1	1		50.00	0.00	50.00	AVA

Estimate Provided?
 Yes No

Sales

Lead > Sales Priority Likely Value
Normal 100.00%

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

Fulfillment

Ffmt. Priority Start Date Ship Date Ship Time
Normal 05/19/26 05/19/26 10:00 PM

Job > Sales Approved to Invoice
861850
Order Needs Estimate
No Charge

Subtotal	400.00	95%
Adjustment	0.00	
Total	400.00	95%
Tax AVA	26.00	Exempt
Grand Total	426.00	83%
Payment Due	426.00	

Packing [410]	100.00
Shipping [710]	50.00
Installation [490]	150.00
Everything Else	100.00

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

Shipment: 112420 Testing Company Inc 5/19/2026 PENDING

Outgoing Shipment Notices Emails Docs

Shipped To

Company > **Testing Company Inc**
 Contact > **John Q Public**
 Order > Packing Requirements Ship From
861850 ADMIN SUPPORT
 Description
 Prod Value Pack Value Ship Cost SugShipPrice Install Value
100.00 100.00 25.00 37.50 150.00

Shipment Info Purchased

Courier Account # Courier Service Saturday Delivery
FedEx Ground Yes No

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

Courier Tracking # Ship Time Ship Date
 2:00 PM 05/19/26

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
 John Q Public
 2901 Osceola Pkwy
 Orlando, FL 32830

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

Duties Payer Duties Payer Account #

Packing List Intangibles Allocation

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref #(s)
1	> 10CAF	Custom Artisan Frames		> 861850	1	0	#s
2	> BOSWC	Wood Crate		> 861850	1	0	#s
3	> DSI	Installation		> 861850	1	0	#s

Record: 1 of 1
New Edit Delete Print Actions

Invoice: 483620 Testing Company Inc 5/19/2026

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

Invoice Items Override Tax Calculations

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CAF	Custom Artisan Frames	1	100.00	0.00	100.00		AVA
> BOSWC	Wood Crate	1	100.00	0.00	100.00		AVA
> DSI	Installation	1	150.00	0.00	150.00		AVA
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		AVA
> SHIPVAL	Shipment #112420: Custom Artisan Frames (Tax on Shipped Value)					6.50	AVA
> SHIP	Shipment #112420: Custom Artisan Frames (Shipping Tax Allocated)	1	0.00	0.00	0.00	2.44	AVA
> PACKVAL	Shipment #112420: Tax on Packing Value [100.00]					6.50	AVA
> SHIPVAL	Order #861850: Tax on Shipping Mark-Up [12.50]					0.81	AVA
> INSTALLVAL	Shipment #112420: Tax on Install Value [150.00]					9.75	AVA

Subtotal 400.00 26.00

Adjustment 0.00 0.00

Total 400.00 0.00

Tax Ex AVA 26.00

Grand Total 426.00

Example D2

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

Items: **10CAF** (Production Code), **DSI**(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) . No entry covering the difference between the Shipment’s SuggShipPrice and the sum of Shipping Order Items in the Order appears because there is no difference between them.

Record: 5 of 6 New + Edit ✎ Delete ✕ Print 🖨 Actions ⚡

Order: 861849 Testing Company Inc 05/19/2026 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 ✕ 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	Shipping	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	420-7	> 10CAF	Custom Artisan Frames			✕	1	1		100.00	0.00	100.00	AVA
2	2	Submit	410-5	> BOSWC	Wood Crate			✕	1	1		100.00	0.00	100.00	AVA
3	3	Submit	490-1	> DSI	Installation			✕	1	1		150.00	0.00	150.00	AVA
4	4	Submit	710-1	> FEDEX	Fedex Shipping			✕	1	1		50.00	0.00	50.00	AVA

Estimate Provided?
 Yes No

Sales ✎

Lead > Sales Priority Likely Value
 Normal 100.00%

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

Fulfillment ✎

Fmt Priority Start Date Ship Date Ship Time
 Normal 05/19/26 05/19/26 7:00 PM

Job > Sales Approved to Invoice
 Order Needs Estimate
 No Charge

Subtotal	400.00	95%
Adjustment	0.00	
Total	400.00	95%
Tax AVA	26.00	<input type="checkbox"/> Exempt
Grand Total	426.00	89%
Payment Due	426.00	

Packing [410]	100.00
Shipping [710]	50.00
Installation [490]	150.00
Everything Else	100.00

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

Shipment: 112419 Testing Company Inc 5/19/2026 SHIPPED ●

Outgoing Shipment Notices 🗨 Emails ✉ Docs 📄

Shipped To ✎

Company > Contact >
 Testing Company Inc John Q Public

Order > Packing Requirements Ship From
 861849 ADMIN SUPPORT

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
100.00	100.00	37.50	50.00	150.00

Shipment Info Purchased

Courier Account # Courier Service Saturday Delivery
 FedEx Ground Yes No

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

Courier Tracking # Ship Time Ship Date
 2:00 PM 05/19/26

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address 📍

Testing Company Inc
 John Q Public
 2901 Osceola Pkwy
 Orlando, FL 32830

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

Duties Payer Duties Payer Account #

Packing List Intangibles Allocation

Line Item	Line Item Code	Description	Order	Quantity	Weight	Ref #(s)
1	3	> DSI Installation	✎ > 861849	1	0	#s ✕
2	2	> BOSWC Wood Crate	✎ > 861849	1	0	#s ✕
3	1	> 10CAF Custom Artisan Frames	✎ > 861849	1	0	#s ✕

Record: 1 of 1 New Edit Delete Print Actions

Invoice: 483619 **Testing Company Inc** **05/19/26** **PENDING**

Invoice Details Notices Emails Docs

Bill To Description Payment Comments

Customer (Bill To) > Contact > [Empty Box]

Testing Company Inc John Q Public

Recur Transaction > Order > [Empty Box]

861849 Testing Company Inc

Additional Info

[Empty Box]

Cust PO # Billing Terms Invoice Due Pmt Expected

[Empty] COD 05/19/26 05/19/26

Invoice Items Override Tax Calculations

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CAF	Custom Artisan Frames	1	100.00	0.00	100.00		AVA
> BOSWC	Wood Crate	1	100.00	0.00	100.00		AVA
> DSI	Installation	1	150.00	0.00	150.00		AVA
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		AVA
> SHIPVAL	Shipment #112419: Custom Artisan Frames (Tax on Shipped Value)					6.50	AVA
> SHIP	Shipment #112419: Custom Artisan Frames (Shipping Tax Allocated)	1	0.00	0.00	0.00	3.25	AVA
> PACKVAL	Shipment #112419: Tax on Packing Value [100.00]					6.50	AVA
> INSTALLVAL	Shipment #112419: Tax on Install Value [150.00]					9.75	AVA

Subtotal	400.00	26.00
Adjustment	0.00	0.00
Total	400.00	0.00
Tax Ex	AVA	26.00
Grand Total	426.00	

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 DSI**(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: 1 of 1 New Edit Delete Print Actions

Invoice: 483625 **Testing Company Inc** **05/21/26** **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

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		AVA
> 10CAF	Frame	1	200.00	0.00	200.00		AVA
> 10ID	Display	1	300.00	0.00	300.00		AVA
> VAN1	Brooklyn/Manhattan Small Van Delivery	2	145.00	55.00	400.00		AVA
> SHIPVAL	Shipment #112434: Custom Display Fabrication (Tax on Shipped Value)					0.65	AVA
> SHIP	Shipment #112434: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	9.43	AVA
> SHIPVAL	Shipment #112435: Frame (Tax on Shipped Value)					15.50	AVA
> SHIP	Shipment #112435: Frame (Shipping Tax Allocated)	1	0.00	0.00	0.00	4.50	AVA
> SHIPVAL	Shipment #112435: Display (Tax on Shipped Value)					23.25	AVA
> SHIP	Shipment #112435: Display (Shipping Tax Allocated)	1	0.00	0.00	0.00	6.75	AVA
> SHIPVAL	Order #861856: Tax on Shipping Mark-Up [110.00]					7.15	AVA
					Subtotal	910.00	67.23
					Adjustment	0.00	0.00
					Total	910.00	0.00
					Tax Ex	AVA	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 \$12.50. The value in brackets is equal to the Price of the shipping Order Item \$50 minus (\$12.50x2) [\$25], 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%.

Record: 1 of 2 New Edit Delete Print Actions

Shipment: 112438 Testing Company Inc 5/21/2026 SHIPPED

Outgoing Shipment Notices Emails Docs

Shipped To

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

Order > **861858** Packing Requirements Ship From **ADMIN SUPPORT**

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
10.00	300.00	0.00	12.50	200.00

Shipment Info Purchased

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

Package Type L W H Weight
 x x x

Courier Tracking # Ship Time **2:00 PM** Ship Date **05/21/26**

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
 John Q Public
 2901 Osceola Pkwy
 Orlando, FL 32830

Phone Email Address **JQP@test.com** Notify

(555) 555-5555

Duties Payer Duties Payer Account #

Packing List Intangibles Allocation

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref #(s)
1	> 10CDF	Custom Display Fabrication		> 861858	1	0	#s
2	> VI	OS -Vendor Installation		> 861858	1	0	#s
3	> BOSWC	B- Wood Crating and Packing		> 861858	1	0	#s

Record: 2 of 2 New Edit Delete Print Actions

Shipment: 112439 Testing Company Inc 5/21/2026 SHIPPED

Outgoing Shipment Notices Emails Docs

Shipped To

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

Order > **861858** Packing Requirements Ship From **ADMIN SUPPORT**

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
10.00	300.00	0.00	12.50	200.00

Shipment Info Purchased

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

Package Type L W H Weight
 x x x

Courier Tracking # Ship Time **2:00 PM** Ship Date **05/21/26**

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
 Mickey Mouse
 1313 Disneyland Dr.
 Anaheim, CA 92802

Phone Email Address Notify

(555) 555-5555

Duties Payer Duties Payer Account #

Packing List Intangibles Allocation

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref #(s)
1	> 10CDF	Custom Display Fabrication		> 861858	1	0	#s
2	> VI	OS -Vendor Installation		> 861858	1	0	#s
3	> BOSWC	B- Wood Crating and Packing		> 861858	1	0	#s

Record: 2 of 3 New Edit Delete Print Actions

Order: 861858 Testing Company Inc 05/21/2026 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 > 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	Shipping	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 Display			X	1	2		10.00	0.00	20.00	AVA
2	2	Submit	490-1	> VI	OS -Vendor Installation			X	1	2		200.00	0.00	400.00	AVA
3	3	Submit	410-5	> BOSWC	B- Wood Crating and			X	1	2		300.00	0.00	600.00	AVA
4	4	Submit	710-1	> FEDEX	Fedex Shipping			X	1	1		50.00	0.00	50.00	AVA

Estimate Provided?

Yes No

Sales

Lead > Sales Priority Likely Value

Normal **100.00%**

Campaign > Type Route Source

Production **---** **---**

Fulfillment

Fmt Priority Start Date Ship Date Ship Time

Normal **05/21/26** **05/21/26** **7:30 PM**

Job > Sales Approved to Invoice

861858 Order Needs Estimate

No Charge

Subtotal	1,070.00	97%
Adjustment	0.00	
Total	1,070.00	97%
Tax AVA	76.09	Exempt
Grand Total	1,146.09	91%
Payment Due	1,146.09	

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

Record: 1 of 1 New Edit Delete Print Actions

Invoice: 483626 **Testing Company Inc** **05/21/26** PENDING

Invoice Details Notices Emails Docs

Bill To

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

Recur Transaction > Order > **861858 Testing Company Inc**

Cust PO # Billing Terms Invoice Due Pmt Expected

COD **05/21/26** **05/21/26**

Description

Payment Comments

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	AVA	X
> VI	OS -Vendor Installation	2	200.00	0.00	400.00	AVA	X
> BOSWC	B- Wood Crating and Packing	2	300.00	0.00	600.00	AVA	X
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00	AVA	X
> SHIPVAL	6.5% Shipment #112438: Custom Display Fabrication (Tax on Shipped Value)				0.65	AVA	X
> SHIP	6.5% Shipment #112438: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	0.81	AVA
> SHIPVAL	7.75% Shipment #112439: Custom Display Fabrication (Tax on Shipped Value)				0.78	AVA	X
> SHIP	7.75% Shipment #112439: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	0.97	AVA
> PACKVAL	6.5% Shipment #112438: Tax on Packing Value [300.00]				19.50	AVA	X
> PACKVAL	7.75% Shipment #112439: Tax on Packing Value [300.00]				23.25	AVA	X
> SHIPVAL	Order #861858: Tax on Shipping Mark-Up [25.00] 6.5%				1.63	AVA	X
> INSTALLVAL	6.5% Shipment #112438: Tax on Install Value [200.00]				13.00	AVA	X
> INSTALLVAL	7.75% Shipment #112439: Tax on Install Value [200.00]				15.50	AVA	X

Subtotal	1,070.00	76.09
Adjustment	0.00	0.00
Total	1,070.00	0.00
Tax Ex AVA	76.09	
Grand Total	1,146.09	

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.

The screenshot shows an invoice for 'Testing Company Inc' dated 05/21/26. The invoice number is 483627. The interface includes sections for 'Bill To' (Customer: Testing Company Inc, Contact: John Q Public), 'Description', and 'Payment Comments'. Below these is a table of 'Invoice Items' with columns for Line Item Code, Description, Quantity, Unit Price, Unit Adj, Total, Tax, and Tax Profile. The items include Custom Display Fabrication, OS -Vendor Installation, B- Wood Crating and Packing, Fedex Shipping, and various shipping and packing charges. A summary table at the bottom right shows Subtotal (1,070.00), Adjustment (0.00), Total (1,070.00), Tax Ex (69.55), and Grand Total (1,139.55).

Line Item Code	Description	Quantity	Unit Price	Unit Adj	Total	Tax	Tax Profile
> 10CDF	Custom Display Fabrication	2	10.00	0.00	20.00		AVA
> SHIPVAL	Order #861858: Custom Display Fabrication (Unshipped Value [20.00])					1.30	AVA
> VI	OS -Vendor Installation	2	200.00	0.00	400.00		AVA
> BOSWC	B- Wood Crating and Packing	2	300.00	0.00	600.00		AVA
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		AVA
> PACKVAL	Order #861858: Unshipped Packing Value [600.00]					39.00	AVA
> SHIPVAL	Order #861858: Tax on Shipping Mark-Up [50.00]					3.25	AVA
> INSTALLVAL	Order #861858: Unshipped Install Value [400.00]					26.00	AVA

Subtotal	1,070.00	69.55
Adjustment	0.00	0.00
Total	1,070.00	0.00
Tax Ex	AVA	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 = \$12.50 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 \$12.50. The value in brackets is equal to the Price of the shipping Order Item \$50 minus (\$12.50x2) [\$25], 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%.

Record: 1 of 2 New Edit Delete Print Actions

Shipment: 112440 Testing Company Inc 5/21/2026 SHIPPED

Outgoing Shipment Notices Emails Docs

Shipped To

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

Order > **861859** Packing Requirements > **SHIPPING - BLDG25** Ship From >

Description

Prod Value	Pack Value	Ship Cos	SugShipPrice	Install Value
10.00	300.00	0.00	12.50	200.00

Shipment Info Purchased

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

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

Courier Tracking # > Ship Time > **2:00 PM** Ship Date > **05/21/26**

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
Moana
92-1185 Alinui Dr
Kapolei, HI 96707

Phone > Email Address > Notify x

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

Duties Payer > Duties Payer Account # >

Packing List Intangibles Allocation

Line Item	Line Item Code	Description	Order	Quantity	Weight	Ref #(s)
1	> 10CDF	Custom Display Fabrication	> 861859	1	0	#s
2	> BOSWC	B- Wood Crating and Packing	> 861859	1	0	#s
3	> VI	OS -Vendor Installation	> 861859	1	0	#s

Record: 2 of 2 New Edit Delete Print Actions

Shipment: 112441 Testing Company Inc 5/21/2026 SHIPPED

Outgoing Shipment Notices Emails Docs

Shipped To

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

Order > **861859** Packing Requirements > **SHIPPING - BLDG25** Ship From >

Description

Prod Value	Pack Value	Ship Cos	SugShipPrice	Install Value
10.00	300.00	0.00	12.50	200.00

Shipment Info Purchased

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

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

Courier Tracking # > Ship Time > **2:00 PM** Ship Date > **05/21/26**

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
Mickey Mouse
1313 Disneyland Dr.
Anaheim, CA 92802

Phone > Email Address > Notify

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

Duties Payer > Duties Payer Account # >

Packing List Intangibles Allocation

Line Item	Line Item Code	Description	Order	Quantity	Weight	Ref #(s)
1	> 10CDF	Custom Display Fabrication	> 861859	1	0	#s
2	> BOSWC	B- Wood Crating and Packing	> 861859	1	0	#s
3	> VI	OS -Vendor Installation	> 861859	1	0	#s

Record: 1 of 2 New Edit Delete Print Actions

Order: 861859 Testing Company Inc 05/21/2026 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: **COD** Disc %

Ship To 100 Broadway

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

Order Items	Schedule	Shipping	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 Display Fabrication		<input checked="" type="checkbox"/>	3	1		10.00	0.00	30.00	AVA					
2	2	Submit	490-1	>	VI	OS -Vendor Installation		<input checked="" type="checkbox"/>	3	1		200.00	0.00	600.00	AVA					
3	3	Submit	410-5	>	BOSWC	B- Wood Crating and Packing		<input checked="" type="checkbox"/>	3	1		300.00	0.00	900.00	AVA					
4	4	Submit	710-1	>	FEDEX	Fedex Shipping		<input checked="" type="checkbox"/>	1	1		50.00	0.00	50.00	AVA					

Estimate Provided?
 Yes No

Sales

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

Fulfillment

Print Priority: **Normal** Start Date: **05/21/26** Ship Date: **05/21/26** Ship Time: **1:00 PM**
 Job > **861859** Sales Approved to Invoice
 Order Needs Estimate
 No Charge

Subtotal	1,580.00	97%
Adjustment	0.00	
Total	1,580.00	97%
Tax AVA	111.50	Exempt
Grand Total	1,691.50	91%
Payment Due	1,691.50	

Packing [410] 900.00
 Shipping [710] 50.00
 Installation [490] 600.00
 Everything Else 30.00

Record: 1 of 1 New Edit Delete Print Actions

Invoice: 483628 Testing Company Inc 05/21/26 PENDING

Invoice Details Notices Emails Docs

Bill To

Customer (Bill To) > **Testing Company Inc**
 Contact > **John Q Public**
 Recur Transaction > Order > **861859 Testing Company Inc**
 Cust PO # Billing Terms Invoice Due Pmt Expected
COD **05/21/26** **05/21/26**

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	3	10.00	0.00	30.00	0.89	AVA					
> SHIPVAL	8.875% Order #861859: Custom Display Fabrication (Unshipped Value [10.00])						AVA					
> VI	OS -Vendor Installation	3	200.00	0.00	600.00		AVA					
> BOSWC	B- Wood Crating and Packing	3	300.00	0.00	900.00		AVA					
> FEDEX	Fedex Shipping	1	50.00	0.00	50.00		AVA					
> SHIPVAL	4.5% Shipment #112440: Custom Display Fabrication (Tax on Shipped Value)					0.45	AVA					
> SHIP	Shipment #112440: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	0.56	AVA					
> SHIPVAL	7.75% Shipment #112441: Custom Display Fabrication (Tax on Shipped Value)					0.78	AVA					
> SHIP	Shipment #112441: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	0.97	AVA					
> PACKVAL	8.875% Order #861859: Unshipped Packing Value [300.00]					26.63	AVA					
> PACKVAL	4.5% Shipment #112440: Tax on Packing Value [300.00]					13.50	AVA					
> PACKVAL	7.75% Shipment #112441: Tax on Packing Value [300.00]					23.25	AVA					
> SHIPVAL	8.875% Order #861859: Tax on Shipping Mark-Up [25.00]					2.22	AVA					
> INSTALLVAL	8.875% Order #861859: Unshipped Install Value [200.00]					17.75	AVA					
> INSTALLVAL	4.5% Shipment #112440: Tax on Install Value [200.00]					9.00	AVA					
> INSTALLVAL	7.75% Shipment #112441: Tax on Install Value [200.00]					15.50	AVA					

Subtotal	1,580.00	111.50	91%
Adjustment	0.00		
Total	1,580.00		
Tax Ex AVA	111.50		
Grand Total	1,691.50		

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%.

Record: 1 of 2 New + Edit ✎ Delete ✕ Print 🖨 Actions ⚙

Shipment: 112442 Testing Company Inc 5/21/2026 SHIPPED

Outgoing Shipment Notices 📢 Emails ✉ Docs 📄

Shipped To ✎

Company > Contact >

Order > Packing Requirements Ship From

Description

Prod Value	Pack Value	Ship Cos	SugShipPrice	Install Value
20.00	600.00	0.8	13.30	400.00

Shipment Info Purchased

Courier Account # Courier Service Saturday Delivery Yes No

Package Type L x x W x H Weight

Courier Tracking # Ship Time Ship Date

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address 📍

Phone Email Address Notify

Duties Payer Duties Payer Account #

Packing List Intangibles Allocation

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref #(s)
1	> 10CDF	Custom Display Fabrication		✎ > 861860	2	0	#s ✕
2	> VI	OS -Vendor Installation		✎ > 861860	2	0	#s ✕
3	> BOSWC	B- Wood Crating and Packing		✎ > 861860	2	0	#s ✕

Record: 2 of 2 New + Edit Delete ✕ Print 🖨 Actions ⚙

Shipment: 112443 Testing Company Inc 5/21/2026

SHIPPED

Outgoing Shipment Notices ! Emails ✉ Docs 📄

Shipped To

Company > Contact >

Order > Packing Requirements Ship From

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
10.00	400.00	0.80	13.30	550.00

Shipment Info Purchased

Courier Account # Courier Service Saturday Delivery Yes No

Package Type L x W x H Weight

Courier Tracking # Ship Time Ship Date

Package IDs Ref 01 Ref 02 Ref 03

Shipping Address

Testing Company Inc
Mickey Mouse
1313 Disneyland Dr.
Anaheim, CA 92802

Phone Email Address Notify

Duties Payer Duties Payer Account #

Packing List Intangibles Allocation

Line Item	Line Item Code	Description	Packing List Notes	Order	Quantity	Weight	Ref # (s)
1	10CDF	Custom Display Fabrication		861860	1	0	#
2	VI	OS -Vendor Installation		861860	1	0	#
3	BOSWC	B- Wood Crating and Packing		861860	1	0	#
4	WHP	Westhampton Packing and Fulfillment		861860	1	0	#
5	DSI	Installation		861860	1	0	#

Record: 1 of 2 New + Edit Delete ✕ Print 🖨 Actions ⚙

Order: 861860 Testing Company Inc 05/21/2026

OPEN

Production Order 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 Service Courier Account #

Ship Together

Shipping Terms FOB Email Address Notify

Activities & Comments

Non-Prd Notes

Notes for Invoice

Invoice Description

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

Order Items Schedule Shipping 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 Display Fabrication			✕	3	1		10.00	0.00	30.00	AVA
2	Submit	490-1	>	VI	OS -Vendor Installation			✕	3	1		200.00	0.00	600.00	AVA
3	Submit	410-5	>	BOSWC	B- Wood Crating and Packing			✕	3	1		300.00	0.00	900.00	AVA
4	Submit	410-0	>	WHP	Westhampton Packing and Fulfillment			✕	2	1		100.00	0.00	200.00	AVA
5	Submit	490-1	>	DSI	Installation			✕	2	1		350.00	0.00	700.00	AVA
6	Submit	710-1	>	FEDEX	Fedex Shipping			✕	1	1		26.60	0.00	26.60	AVA

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	2,456.60	98%
Adjustment	0.00	
Total	2,456.60	98%
Tax AVA	161.88	Exempt
Grand Total	2,618.48	92%
Payment Due	2,618.48	

Packing [410]	1,100.00
Shipping [710]	26.60
Installation [490]	1,300.00
Everything Else	30.00

Record: 1 of 1 New Edit Delete Print Actions

Invoice: 483629 **Testing Company Inc** **05/21/26** **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

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		AVA	✕
> VI	OS -Vendor Installation	3	200.00	0.00	600.00		AVA	✕
> BOSWC	B- Wood Crating and Packing	3	300.00	0.00	900.00		AVA	✕
> WHP	Westhampton Packing and Fulfillment	2	100.00	0.00	200.00		AVA	✕
> DSI	Installation	2	350.00	0.00	700.00		AVA	✕
> FEDEX	Fedex Shipping	1	26.60	0.00	26.60		AVA	✕
> SHIPVAL	4.5% Shipment #112442: Custom Display Fabrication (Tax on Shipped Value)					0.90	AVA	✕
> SHIP	4.5% Shipment #112442: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	0.60	AVA	✕
> SHIPVAL	7.75% Shipment #112443: Custom Display Fabrication (Tax on Shipped Value)					0.78	AVA	✕
> SHIP	7.75% Shipment #112443: Custom Display Fabrication (Shipping Tax Allocated)	1	0.00	0.00	0.00	1.03	AVA	✕
> PACKVAL	8.875% Order #861860: Unshipped Packing Value [100.00]					8.88	AVA	✕
> PACKVAL	4.5% Shipment #112442: Fax on Packing Value [600.00]					27.00	AVA	✕
> PACKVAL	7.75% Shipment #112443: Fax on Packing Value [400.00]					31.00	AVA	✕
> INSTALLVAL	8.875% Order #861860: Unshipped Install Value [350.00]					31.06	AVA	✕
> INSTALLVAL	4.5% Shipment #112442: Fax on Install Value [400.00]					18.00	AVA	✕
> INSTALLVAL	7.75% Shipment #112443: Fax on Install Value [550.00]					42.63	AVA	✕

Subtotal	2,456.60	161.88
Adjustment	0.00	0.00
Total	2,456.60	0.00
Tax Ex <input type="checkbox"/>	AVA	161.88
Grand Total	2,618.48	