



Quick Reference Guide

Adding Shipping to an Invoice

Audience: Vendor
Date: Oct 06, 2020

Slide 3: PO Invoices

Slide 4: Non-PO Invoices

Adding Shipping to an Invoice- PO only

Note: Only add shipping where it is a total charge against the purchase order and it is not already included

➤ With the Invoice open

1. Select **Header level shipping**

2. Click on **Add to Header**

3. Select **Shipping Cost**

➤ The Shipping cost section will open

4. Enter the **Shipping Amount**

5. Click on **Update**

➤ Click again on **Add To Header**

6. Click on **Shipping Tax**

➤ The Shipping Tax section will be displayed

7. Confirm or select the correct tax **Category**

➤ The total for the tax rate selected is displayed

Shipping

Header level shipping Line level shipping

Ship From:

Ship To:

View/Edit Addresses

Deliver To:

Create Invoice

Update Save Exit

Invoice Header

Summary

Purchase Order: 0000220925 Subtotal: \$499.00 AUD
Invoice #: 555466-1 Invoice Date: 26 Nov 2018 Total Tax: \$0.00 AUD
Amount Due: \$499.00 AUD

Shipping Cost

Shipping Tax

Shipping Documents

Special Handling

Special Handling Tax

Additional Reference Documents and Dates

Comment

Attachment

Shipping

Header level shipping Line level shipping

Ship From:

Ship To:

View/Edit Addresses

Deliver To:

Shipping Cost

Shipping Amount: \$34.67 AUD

Shipping Date:

Remove

Shipping Tax

Category: 10% GST / Inclusive

Location:

Description: Inclusive

Regime:

Taxes

0% GST / Free

0% GST / Exempt

10% GST / Inclusive

Taxable Amount: \$34.67 AUD

Tax Rate Type:

Rate(%): 10

Tax Amount: \$3.47 AUD

Exempt Detail: (no value)

Remove

1 Shipping

Header level shipping ⓘ Line level shipping ⓘ

Ship From: **STANTEC CONSULTING LTD-TEST**
Calgary AB
Canada

Ship To: **City of Ottawa - TEST**
Ottawa ON
Canada
Deliver To:

- 1 Select 'Header Level Shipping'
- 2 Under 'Add to Header', click on 'Shipping Cost'.

Supplier VAT/Tax ID:*

Add to Header ▼

- Shipping Cost
- Shipping Tax
- Shipping Documents
- Special Handling
- Special Handling Tax
- Payment Term
- Additional Reference Documents and Dates
- Comment
- Attachment

0 Line Items, 0 Ir

HST ▼ Discount

| Option | Customer Part # | Quantity | Unit |
|------------------|-----------------|----------|------|
| No item selected | | | |

Feedback

Update

Shipping

Header level shipping ⓘ Line level shipping ⓘ

Ship From: **STANTEC CONSULTING LTD-TEST**
Calgary AB
Canada

Ship To: **City of Ottawa - TEST**
Ottawa ON
Canada
Deliver To:

Shipping Cost

1

Shipping Amount:

Shipping Date:

2

- 1 A new 'Shipping Cost' section will open.
- 2 Enter the shipping amount before tax and the shipping date.

Order Information

Customer Order #:

Contract Number:

Sales Order #:

Sales Order Date:

Tax ⓘ

1

Header level tax ⓘ

Line level tax ⓘ

Shipping

Header level shipping ⓘ

Line level shipping ⓘ

Ship From: **STANTEC CONSULTING LTD-TEST**

Calgary AB
Canada

Ship To: **City of Ottawa - TEST**

Ottawa ON
Canada

Deliver To:



This step is only applicable when adding shipping to a Non-PO. Tax will only need to be entered at the line level when you've added shipping and shipping tax at the header level.

1

Select 'Line level tax' for the invoice so that you can add header level shipping tax.

Adding Shipping to an Invoice- Non-PO only

Supplier VAT/Tax ID:*

Add to Header ▼

0 Line Items, 0 Ir

1 Line Item

- Shipping Cost
- Shipping Tax
- Shipping Documents
- Special Handling
- Special Handling Tax
- Payment Term
- Additional Reference Documents and Dates
- Comment
- Attachment

HST Discount

No item selected

Feedback

Update

1 Under 'Add to Header', click on 'Shipping Tax'.

Shipping Cost

Shipping Amount:

Shipping Date:

1 Shipping Tax

Category: *

Location:

Description: Sales Tax - HST

Regime:

Taxable Amount:

Tax Rate Type:

Rate(%): 13

Tax Amount:

1

A new 'Shipping Tax' section will open.

2

Select the tax category from the drop down menu.

2

Line Items 1 Line Items, 1 Included, 0 Previously Fully Invoiced

Insert Line Item Options Tax Category: Discount Add to Included Lines

| No. | Include | Type | Part # | Description | Customer Part # | Quantity | Unit | Unit Price | Subtotal |
|-----|-------------------------------------|---------|---------------|----------------------------------|-----------------|----------|------|----------------|----------------|
| 1 | <input type="checkbox"/> | | Not Available | City of Ottawa - General Service | | | | | |
| 1 | <input checked="" type="checkbox"/> | SERVICE | | Service #1 | | 1 | each | \$2,500.00 CAI | \$2,500.00 CAI |

Service Period: Service Start Date: 5 May 2020 Service End Date: 7 May 2020

Tax

Line Item Actions: Edit, Add, Tax, Shipping Documents, Special Handling, Discount, Comments, Attachment

Update Save Exit Next



This step is only applicable when adding shipping to a Non-PO. Tax will only need to be entered at the line level when you've added shipping and shipping tax at the header level.

1

1

Select the line item to take action.

2

2

Select 'Tax'

1

Category:* 13% Sales Tax / Sales Tax - HST

Location:

Description: Sales Tax - HST

Regime:

2

Taxes

- 13% Sales Tax / Sales Tax - HST
- 0% Sales Tax / Sales Tax - 0%
- 5% Sales Tax / Sales Tax - GST
- 8% Sales Tax / Sales Tax - PST

Taxable Amount: \$0.00 CAD

Tax Rate Type:

Rate(%): 13

Tax Amount: \$0.00 CAD



This step is only applicable when adding shipping to a Non-PO. Tax will only need to be entered at the line level when you've added shipping and shipping tax at the header level.

1

Click on the drop down menu to select tax type.

2

Select 'Sales Tax' unless an alternate tax applies.