



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 ① ☐ Line level shipping ①

Ship From:

Ship To: [View/Edit Addresses](#)

Deliver To:

Create Invoice ⑤ [Update](#) [Save](#) [Exit](#) [Next](#) ②

Invoice Header

Summary

Purchase Order:	0000220925	Subtotal:	\$499.00 AUD
Invoice #:	555466-1	Total Tax:	\$0.00 AUD
Invoice Date:	26 Nov 2018	Amount Due:	\$499.00 AUD
Service Description:	<input type="text"/>		
Supplier Tax ID:	12345678		

Shipping Cost ③

Shipping Amount: ④

Shipping Date: [Remove](#)

Shipping Tax

Category: * ⑦

Location:

Description: Inclusive

Regime:

Taxes

- ☐ 0% GST / Free
- ☐ 0% GST / Exempt
- ☒ 10% GST / Inclusive

Taxable Amount: [Remove](#)

Tax Rate Type:

Rate(%): 10

Tax Amount: \$3.47 AUD

Exempt Detail: (no value)

Shipping Tax ⑥

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

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:

Supplier VAT/Tax ID: *

Add to Header ▼

2

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

1

Select 'Header Level Shipping'

2

Under 'Add to Header', click on 'Shipping Cost'.

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:

\$12.99 CAD

Shipping Date:

18 Feb 2021



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

Insert Line Item

Shipping Cost

Shipping Tax

Shipping Documents

Special Handling

Special Handling Tax

Payment Term

Additional Reference Documents and Dates

Comment

Attachment

HST

Discount

Option

Customer Part #

Quantity

Unit

No item selected

Feedback

Update

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

Shipping Cost

Shipping Amount:

\$12.99 CAD

Shipping Date:

18 Feb 2021



1

Shipping Tax

Category: *

13% Sales Tax / Sales Tax - HST



Location:

Description: Sales Tax - HST

Regime:

Taxable Amount:

\$12.99 CAD

Tax Rate Type:

Rate(%): 13

Tax Amount: \$1.69 CAD

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 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

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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 the line item to take action.



2 Select 'Tax'

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

Location:

Description: Sales Tax - HST

Regime: ▼

Taxable Amount: \$0.00 CAD

Tax Rate Type:

Rate(%): 13

Tax Amount: \$0.00 CAD

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



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.



Click on the drop down menu to select tax type.



Select 'Sales Tax' unless an alternate tax applies.