

SalesPage Tax Calculation

Step-by-Step Guide for Sales Representatives

Robbins Research International

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Prepared by: Technology Department

What's Changed?

The SalesPage now calculates sales tax automatically using **Stripe Tax**. Here's what's different:

Before (Old System)	After (Stripe Tax)
Flat rate based on US state only	Precise rates for US states, United Kingdom Value Added Tax, Australia Goods and Services Tax, and more
Same rate for all products in a state	Per-product tax codes determine taxability and rate
US addresses only	International tax calculation
Rates could become outdated	Stripe maintains current rates automatically

What stays the same:

The SalesPage layout is identical. You still add products, enter addresses, and process payments the same way. **If the shipping address is already on the Opportunity before you add line items, tax calculates automatically.**

If not, use the "Calculate Tax" button after entering the address.

Key Points

- Tax is calculated **per line item** — each product gets its own tax amount
- **Balance Due and Amount to Pay** automatically update to include tax
- Tax is **exclusive** — added on top of the product price (prices do not change)
- Products without a tax code configured will show \$0.00 tax

Quick Reference Checklist

- Add all products to the order
- Enter or verify the customer's complete shipping address (including country)
- Verify tax amounts populated automatically — if not, click "Calculate Tax"
- Verify tax amounts appear in the TAX column
- Confirm the Balance Due includes tax
- Process payment

Step 1-2: Add Products & Enter Address

1 Open the SalesPage and add products

Navigate to the Opportunity and click the green "Update" button. Add products as usual. Notice the **TAX** column shows **\$0.00** for all items — this is expected before tax calculation.

2 Verify or enter the shipping address

Check the **Shipping/Tax Details** section. If the customer's shipping address is already on the Opportunity (from the Account or a previous order), **tax will calculate automatically when line items are added**. If the address is not present, fill it in — the country is especially important.

Address already on file?

If the address was on the Opportunity before you added products, tax is already calculated — check the TAX column. No need to click "Calculate Tax" unless you change the address or products.

SalesPage before tax calculation — TAX column shows \$0.00, Balance Due = product subtotal only

The shipping address must be complete before calculating tax.

Without a valid Country, State/Province, and Postal Code, tax cannot be determined.

Step 3: Click "Calculate Tax"

3 If needed: Click the "Calculate Tax" button

If tax amounts are already showing in the TAX column (because the address was on the Opportunity before you added products), **skip this step**. Otherwise, find the "Calculate Tax" button in the action bar at the bottom of the page:

Action bar — "Calculate Tax" button is between "Save at Current Stage" and "Send Homework"

Clicking this button sends the order details and shipping address to Stripe Tax. The page will refresh momentarily while tax is calculated. Once complete, you will see the results immediately.

When to use this button:

- You entered or changed the shipping address *after* adding line items
- You added or removed products after tax was already calculated
- Tax amounts show \$0.00 and you want to recalculate

Step 4: Review Tax Amounts

4 Check the Order Details table

After calculation, the **TAX** column shows per-item tax and the totals update:

ITEM NAME	PRODUCT CODE	UNIT PRICE	QUANTITY	TOTAL PRICE	TAX	SUB TOTAL
Breathrough Ultimate Edge(NRI)	844-05-12	\$249.00	1.00	\$249.00	\$49.80	\$298.80
Breathrough Time of Your Life Class(NRI)	844-05-20	\$249.00	1.00	\$249.00	\$49.80	\$298.80
Breathrough Creativity Letting Design(NRI)	844-05-30	\$249.00	1.00	\$249.00	\$49.80	\$298.80
Breathrough Ultimate Resonance Program(NRI)	844-05-40	\$249.00	1.00	\$249.00	\$49.80	\$298.80
Breathrough Meeting Influence(NRI)	844-05-50	\$249.00	1.00	\$249.00	\$49.80	\$298.80
Breathrough Body You Dream(NRI)	844-05-60	\$249.00	1.00	\$249.00	\$49.80	\$298.80
Breathrough Personal Power (NRI)	844-05-70	\$249.00	1.00	\$249.00	\$49.80	\$298.80
Platinum Bundle Products	789-00-00	\$0.00	1.00	\$0.00	\$0.00	\$0.00
				Subtotal \$1743.00	Total tax \$348.60	Purchase Total \$2091.60

Order Details after tax calculation — each \$249.00 item now shows \$49.80 tax (United Kingdom Value Added Tax at 20%)

Field	What It Shows
TAX (per line)	Tax for that product based on the shipping address
SUB TOTAL (per line)	Product price + tax for that line
Total tax	Sum of all line item taxes (\$348.60 in this example)
Purchase Total	Subtotal + Total tax (\$2,091.60 in this example)

Example shown:

United Kingdom Value Added Tax at 20% — each \$249.00 product has \$49.80 tax added. Seven taxable items x \$49.80 = \$348.60 total tax.

Step 5-6: Verify Details & Process Payment

5 Check the Shipping/Tax Details section

After calculation, the **Tax Rate** field displays the applied rate. Verify the address is correct:

Shipping/Tax Details — address shown with Tax Rate of 20.0 (United Kingdom Value Added Tax)

6 Process the payment

The **Balance Due** and **Amount to Pay** now include tax. Process the payment as usual:

Payment Details — Balance Due updated to \$2,091.60 (Includes \$348.60 tax)

If you change the address or products after tax has been calculated:

Click "Calculate Tax" to recalculate before processing payment. Whether tax was calculated automatically or via the button, any changes to the address or product list require a recalculation.

Step 7: Save the Order

7 Save at Current Stage or change the Stage

After processing payment (or if saving the order for later), click "Save at Current Stage" or select a new Stage from the dropdown. The Tax amounts will be saved with the Opportunity.

Full Page View: Before Tax Calculation

This is what the SalesPage looks like when first opened — before clicking "Calculate Tax". All TAX values are \$0.00 and the Balance Due equals the product subtotal.

SalesPage — BEFORE tax calculation (TAX = \$0.00, Balance Due = \$1,743.00)

Full Page View: After Tax Calculation

After clicking "Calculate Tax" — each line shows its tax amount, totals include tax, and the Balance Due reflects the tax-inclusive purchase total.

SalesPage — AFTER tax calculation (TAX = \$49.80/item, Total tax = \$348.60, Balance Due = \$2,091.60)

Frequently Asked Questions

What if "Calculate Tax" shows \$0.00 for all items?

- The shipping address is missing or incomplete (especially the country) — verify and try again
- The product may not be taxable in the customer's jurisdiction — this is normal and expected for many product/location combinations
- The shipping destination is in a jurisdiction where RRI is not registered for tax

If the address is complete and you've clicked "Calculate Tax," a \$0.00 tax amount is most likely correct — the product is simply not taxable for that location. **No action needed.**

Do I have to click "Calculate Tax" every time?

No! Always. If the shipping address is already on the Opportunity before you add line items, tax calculates automatically — you'll see the TAX column populate as you add products. The "Calculate Tax" button is there as a backup for when:

- The address was entered or changed *after* line items were already added
- You added or removed products after the initial tax calculation
- You want to force a recalculation for any reason

What if tax isn't showing before I process payment?

If the TAX column still shows \$0.00, click "Calculate Tax" before processing payment. If you process payment without tax, the payment will go through at the subtotal amount only. **Always verify tax amounts are showing in the TAX column before processing payment.**

Does this work for all countries?

Tax is calculated for jurisdictions where RRI has registered tax obligations:

- **United Kingdom** — Value Added Tax (20%)
- **Australia** — Goods and Services Tax (10%)
- Additional jurisdictions will be added as RRI registers

Are product prices changing?

No. Tax is **exclusive** — added on top of the existing price. A \$249.00 product stays \$249.00; the tax is a separate line.

What about the \$0.00 item in the example?

The "Platinum Bundle Products" line at \$0.00 correctly shows \$0.00 tax — tax is calculated on the price, and 20% of \$0 is \$0.

Who do I contact if something looks wrong?

Submit a helpdesk ticket to the Technology team if tax amounts seem incorrect or if you encounter errors.