

Sales Tax: A Quick Reference Guide for Sales Teams

July 12, 2026 • For team members who build orders, process payments, send checkout links, or close Opportunities.

KEY PRINCIPLE: Select "Calculate Tax" on every order, every time.

Sales tax is now calculated automatically by the system. You are not expected to know any tax rates, and tax amounts are never entered manually. The one step that matters is making sure tax has been calculated before a payment is processed, a checkout link is sent, or an Opportunity is closed.

When should tax be calculated?

- Once all products have been added to the order and the customer's address has been entered.
- Again after any change to the order — adding or removing a product, changing a quantity or price, applying a discount, or updating the customer's address. Any change means the previous tax amount is no longer current, so the calculation should be run again.
- On every order, even when zero tax is expected. A result of \$0.00 is a valid outcome, but the calculation step is still required. Please do not skip it based on the assumption that no tax applies.

Getting to the Sales Page

The Sales Page is where tax is calculated. To reach it, open the Opportunity and select the green "Update" button. This opens the Sales Page for that order.

On the Sales Page (building an order)

- Build the order as usual: customer, products, quantities, and prices.
- Confirm the customer's address is entered. The calculation is based on this address, and the full address gives the most accurate result. At minimum, the Country and ZIP or postal code are required for the calculation to run.
- Select the "Calculate Tax" button.
- The tax amount will appear in the TAX column next to each product line, with the Sales Tax total shown near the order total.
- How to know it worked: the page refreshes with no error message at the top. That is the confirmation — the calculation is complete. Keep in mind that when no tax applies, the TAX column may show \$0.00 or appear blank; that is still a successful calculation.
- Save or continue to payment as normal.

Processing a payment

- Tax must be calculated before a payment can be processed. Once it has been, payment works exactly as it always has — the total charged is the product total plus the calculated tax.
- If the order has changed since tax was last calculated, select "Calculate Tax" again before processing the payment.

Sending a checkout link

- The same principle applies: select "Calculate Tax" before sending the link.
- If tax has not been calculated, or the order has changed since it was, the system will not send the link. Recalculate, then send.
- If the full address is not yet available: tax can still be calculated with just the customer's Country and ZIP or postal code. Enter at least those two fields, select "Calculate Tax", and the link can be sent. The complete address can be added later — just remember that updating the address means recalculating.

On the Opportunity page (closing a deal)

- An Opportunity cannot be moved to Closed Won until tax has been calculated.
- If the payment was processed through the Sales Page, this has already been handled and closing works normally.
- If the close is blocked, select the green "Update" button on the Opportunity to open the Sales Page, select "Calculate Tax", save, and then close the Opportunity.

Common messages and how to resolve them

Message: "Tax must be calculated before processing payment"

What to do: The order has changed since tax was last calculated, or it has not yet been calculated. Select "Calculate Tax" and allow the page to refresh. If no error message appears at the top of the page, the calculation was successful — even if the TAX column shows \$0.00 or is blank because no tax applies. Then process the payment again.

Message: An error when saving the Opportunity as Closed Won that mentions tax calculation

What to do: Select the green "Update" button on the Opportunity to open the Sales Page, select "Calculate Tax", save the order, then close the Opportunity.

Message: The checkout link will not send

What to do: Open the Sales Page (green "Update" button on the Opportunity), select "Calculate Tax", save, then send the link again.

Message: A tax calculation error or "service unavailable" message

What to do: First confirm the customer's address includes, at minimum, the Country and ZIP or postal code — the calculation cannot run without them. Correct anything missing and select "Calculate Tax" again. If the issue continues after a couple of attempts, please reach out to Business Operations, who can resolve it quickly so the sale is not delayed.

Message: Tax shows \$0.00 when a tax amount was expected

What to do: A zero result can be correct — the system determines the amount. As long as "Calculate Tax" was selected and completed without an error, the order is ready to proceed. If the customer has questions about the amount, please direct them to Business Operations rather than adjusting the order.

Please keep in mind

- The system handles all tax amounts — there is no need to enter or edit them manually.
- The "Calculate Tax" step applies to every order, including orders where no tax is expected.
- If the system prevents a payment or a close, run the tax calculation first. If that does not resolve it, please contact Business Operations — they can usually clear it quickly.

Who to contact

For any issue in this guide, please reach out to Business Operations first — they are best positioned to resolve it quickly so the sale is not delayed. Business Operations will engage the Technology team when a system issue requires it.

In summary: open the Opportunity, select the green "Update" button to reach the Sales Page, build the order, complete the address, select "Calculate Tax", and then process payment, send the link, or close the deal. If anything on the order changes, calculate again. For assistance, contact Business Operations.