

## PATHWAYS ABILITIES SOCIETY

### **POLICY: SALES/ WORK ORDERS AND INVOICING**

**Applies to:** All Personnel

Original Approval Date: March 22, 2004

Date Board Approved: December 21, 2012

Replaces Policy Dated: September 12, 2011

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Board Member's Signature

### **PREAMBLE**

Definitions

Sales/Work Order (SWO): An internal form used by the specified service areas to document goods and services provided to a customer in order for administration to generate an invoice.

### **POLICY**

All departments that provide goods and/or services to customers on a credit basis are required to complete a SWO either on a monthly basis for continuous customers or on a per sale or service basis, as required. The administration department generates all invoices from the information on the SWO.

Invoices are sequentially numbered. A copy of the invoice is mailed to the customer and a copy filed with the supporting SWO in the administration office. The invoices provide the details of services and/or products purchased, applicable taxes, terms and conditions. The invoices advise the customers to send all payments directly to Pathways Abilities Society administration.

Social Ventures completes a SWO to advise administration of work completed for contractors, wood products, shredding and bike products. SWO are submitted to the administration department at the end of each month or as otherwise determined. Pathways Abilities Society completes sequentially numbered receipts for bike sales that are paid in full.

Activity Service completes a SWO to advise administration of work completed on contracts, mail-outs, newsletters, photocopying, etc. SWO are completed and submitted to the administration department at the end of each month or as otherwise determined.