

PATHWAYS ABILITIES SOCIETY

PROCEDURE: SALES/ WORK ORDERS AND INVOICING

Applies to: All Personnel

Effective/Revision Date:

March 22, 2004
February 21, 2005
May 30, 2005
November 7, 2006
September 12, 2011
March 1, 2013
May 8, 2013
June 11, 2014
September 18, 2017
September 23, 2019

Bike Sales

1. Open the ShareVision list "BikeWays Database."
2. Locate the bike that is being sold by the tag number.
3. Enter all required information in sales receipt and click okay once completed.
4. Print two copies of the document (receipt).
5. Have the the customer sign both copies.
6. One copy is given to the customer and the other sent to administration.

Shredding

All shredding is considered confidential and should be treated as such.

1. When recycle paper is brought in from the following worksites: Okanagan College, Napa, etc., it is taken to shredding area located at 4 Less Disposal and locked in bin.
2. Shredding brought in by the general public to 1216 St. Paul St. is billed out at \$30.00 per bankers box and stored in the locked C-can at the rear of the building until it is transferred to the shredding department at 4 Less Disposal.
3. Pathways Abilities Society staff weighs the bags from the college and records the weight on a purchase order.
4. There is a ShareVision list "Social Ventures Work Order" created for each purchase order received. If there is an additional pick up of shredding, a "Social Ventures Work Order" is created for the pick up fee.

5. At the end of the month the Employment Manager reviews the “Social Ventures Work Order” ShareVision list ensuring the work orders are completed correctly prior to approving each work order.

6. Administration uses the information on the “Social Ventures Work Order” list to complete invoices to send to the customer. Administration retains a copy with the invoice in the administration office.

Contracted Recycling pick-ups (Billed monthly)

1. When pick ups are completed social ventures staff create a ShareVision list “Social Ventures Work Order” for the pick ups.

2. At the end of the month the Employment Manager reviews the “Social Ventures Work Order” list ensuring the work orders are completed correctly prior to approving each work order.

3. Administration uses the information on the “Social Ventures Work Order” list to complete invoices to send to the customer. Administration retains a copy with the invoice in the administration office.