

# Bimonthly Tasks for January: Weeks 3-4

60 pts each department leaders need to show evidence of completion on or before February 1st. Tasks completed early can be turned in and verified at any time. Divide the tasks up equally so that you can complete them all. All members of the department will receive the same task points. Some time outside of the office might be required to complete the following tasks and some tasks have noted deadlines that are due for competition before the 1st of February

## Sales Department

Points Earned \_\_\_\_\_/60

### Department Meeting:

Meet as a department and read aloud and discuss all tasks for the next 2 weeks. Fill in task sheet with names and who is responsible for each task and turn in a copy of this task sheet to administration as soon as possible. In addition, each Friday/Monday the officers will be awarding work points for each department leader (each day 0-2 pts or 10 per week) for the last 2 weeks in January. Officers failing to complete this will get no work points awarded. HR will be sending out the form to do this.

### 1. Commission Report: (HIGH PRIORITY) Needs to be completed by January 24th

In November you set the percentage that employee would receive for commission on anything they sold. The commission is usually somewhere between 2-5% of the profit the company makes on a sale. The commission is based on subtotal amounts and should not include tax and shipping. Based on the sales at the trade show, using Excel, create a commission report of what each salesperson earned for commission for the trade show events listed below. Send all the reports to payroll by January 26th so the bonuses can be added to the Feb. 1st paycheck.

\_\_\_\_\_ 5pts      Evidence 1.1: Fountain Valley Commission Report → Canvas January 3-4 and Payroll Associate  
Employee responsible for this task

\_\_\_\_\_ 5pts      Evidence 1.2: San Diego Commission Report → Canvas January 3-4 and Payroll Associate  
Employee responsible for this task

\_\_\_\_\_ 5pts      Evidence 1.3: Bakersfield Commission Report → Canvas January 3-4 and Payroll Associate  
Employee responsible for this task

### 2. Bakersfield Report:

Department report found in the matrix under communications. Based on your discussion in your leadership meeting, complete the department report about your department's role that details the areas that went well and areas that need to improve at the trade shows. Each report should cover the following areas; Trade Show Preparation, Trade Show performance and recommendations on areas that need to improve. Save this file as you will be using for department goals in the coming weeks.

\_\_\_\_\_ 10pts      Evidence: Send a digital copy to CEO and a PDF → Canvas January 3-4  
Vice President of Sales

### 3. Trade Show Sales Report:

After each trade show, the sales department will create a trade show sales report (template found in Task Matrix-Sales) In the report you will gather information of all sales that occurred during the trade show and complete the report information. You will print color copies to share with your leadership team and the next meeting. In addition, you will need to get a copy to the accounting department so that they record, commissions, sales tax and shipping collected

\_\_\_\_\_ 10pts      Evidence: Sales Report → Canvas January 3-4  
Employee responsible for this task

### 4. Order & Update Inventory:

After each trade show, the inventory sales associate should calculate the total number of products that sold at the event by recording what was ordered by customers on the order forms and in the POS system. You will need to get a copy of the bank statement from the banker for the credit card and debit card purchases. At the end of the report you will need to calculate how many of each product we sold, how many need to be purchased from the manufacturer and place an order in the Wholesale marketplace to refill our inventory follow the trade show and for our business contracts. If this has not been done for previous months, it needs to be ordered and paid for now. Print the Wholesale marketplace orders and take it to accounting for payment.

\_\_\_\_\_ 5pts      Evidence 4.1: Updated Inventory Control Report → Canvas January 3-4  
Inventory Associate

\_\_\_\_\_ 10pts      Evidence 4.2: Wholesale Marketplace Orders → Canvas January 3-4  
Inventory Associate

### 5. Bakersfield Invoicing:

Complete the invoicing of customers from the Bakersfield trade show that did not pay using credit cards or the debit cards. Send the people invoices using the company email and record the information in the invoice log. If the number of orders is large, it is recommended that several members work on this task to make sure it is completed by the end of the month

\_\_\_\_\_ 10pts      Evidence: Invoice Logs completed by each team member → Canvas January 3-4  
Employee responsible for this task