

Final Tasks - Semester 1

25 pts each department leader needs to turn this sheet in on or before the day of the final. Tasks completed early can be turned in and verified at any time. All work turned in late will be half credit. Divide the tasks up equally so that you can complete them all. All members of the department will receive the same task points.

Turn in a copy of this sheet to your teacher for final grading.

Sales Department

Company Name _____

Task 1: Wholesale Market Orders

You will be using the **Inventory Record** which can be downloaded from the **Task Matrix** under Sales and the wholesale marketplace for this task. Your goal is to keep track of what is ordered and what is sold so you can know when to reorder the items. First, review the Inventory Record (if you have set it up prior to this) and confirm the number of items that the company purchased for its initial inventory. If the **Inventory Record** has not been set up, do so at this time and have the teacher help you set it up. You can check with accounting for what was given to the department for your starting budget. From this point on you will be filling only two types of order and they are detailed below.

Business Contract Orders:

Each month we will be getting a very large order and payment in the bank for our business to business contract set-up by the Vice President of Sales. Each month these orders need to be placed in the wholesale marketing place and recorded on the Inventory Record. Calculate the total amount of sales made in the company bank for the business contract (November & December) and place orders in the wholesale market for each month. Have your teacher help you at this point so you are sure what to do. Once orders have been placed, print the order invoice and take it to accounting and let them know that they need to be pay the invoice.

_____ 5pts **Evidence: Orders Placed for November & December: teacher Observation**

Inventory Associate

Restock Orders:

Restock orders are when you run out of a certain product and need to reorder that product for your inventory. Upon returning from the San Diego Trade Show, calculate the number of each item that was sold at the Fountain Valley and San Diego events. This number can be found in the Trade Show or Monthly sales reports these reports should be kept in the company drive. If you can not find them, ask your Vice President for where they are kept. You will then add up all the items sold at the event and calculate how many more need to be ordered.

_____ 5pts **Evidence: Orders Placed for trade shows: teacher Observation**

Inventory Associate

Task 2: Fountain Valley & San Diego Invoicing:

All available the team members should be invoicing customers from Fountain Valley and San Diego trade show at this point. Using the Invoice log your team has been working on since October, you will be invoicing customers who have purchased from the company but have not yet paid. Meet with your teacher to get trained on how to invoice customers.

Step 1:

You should divide all the order forms up with your available team and have them open the **Invoice Log** in Google sheets. First you will generate a invoice for each customer purchase and save them as a PDF (as the Customer Last Name, First Name) and upload them on the Google drive, by creating a new folder called Invoices. Within that folder create separate folders for each sales event (Fountain Valley Folder, San Diego Folder) and store the PDF invoice in the fold that it is associated with.

Step 2:

Locate the customer e-mail address in the invoice log and using the company Gmail account, write an email to the customer by copying the follow up letter that was developed last task sheet and pasting it into the email. Make any minor changes you need to make in the letter and attach the PDF invoice that is associated with that customer. Once an email has been sent, Update the invoice log with the date the invoice was sent and who sent it.

_____ 15pts **Evidence: Updated Invoice Logs → Canvas Final Tasks**

All Available Sales Team