

TASK DETAILS	
Title	CREATING A BILLING MEMO
Type	TEAM
Activity Stage	BUSINESS PROCESS
Department	MARKETING
Duration	RECURRING
LEARNING OBJECTIVE	OUTPUT
	Billing Memo Format

INTRODUCTION

Purchases within the VCI network can be made directly through the website and Store Manager if the customer has a virtual account. However, some customers prefer to pay using conventional methods. Therefore, it is necessary to issue billing memos (invoices) to ensure payments can be processed properly.

No	ACTIVITY
1	Collecting Customer Payment Data <p>The Chief of Marketing will instruct team members to identify customers who wish to purchase products or services using bank transfers (outside of direct website transactions).</p> <ul style="list-style-type: none"> Create a customer list including the following details: <ul style="list-style-type: none"> Customer or company name Company contact information (email and phone number) Quantity of products/services ordered Total purchase amount per customer
2	Preparing and Sending the Billing Memo <ul style="list-style-type: none"> The Chief of Marketing will draft a memo to the Finance Department requesting invoice preparation for each customer on the list. The Finance Department will then issue and send the invoices directly to the respective customers.
3	Coordinating the Workflow <p>To ensure a smooth process and timely issuance of invoices, the Marketing Department should coordinate the memo preparation schedule with the Finance Department.</p>

REFERENCE

-

TASK TEMPLATE

-