

PROCEDURE NAME: Invoicing Procedure

EFFECTIVE DATE: September 2023

Objective:

The purpose of this procedure is to communicate to all GHWC members the process that should be followed in order to prepare an invoice pertaining to club business. An invoice is usually generated and sent to sponsors when a commitment is made to support our club by their sponsorship.

Process:

The Invoice Sample Form is on the website. The recommendation is that the form is filled out, saved with the appropriate sponsor's name, then emailed to the sponsor, or printed and mailed.

- Go to Grand Haven Woman's Club website www.ghwomansclub.org
- Click on the **Members** button on the left side of the screen, then click on the button marked **Forms**.
- On the *Forms* page, click on the button marked **Invoice Sample Form**. When the *Invoice Sample* form is displayed, click on it.
The form will be downloaded on your computer, most likely in the *Downloads* folder. Notice the form name and location (path) of the form on your computer.
- Open the file and click the *Enable Editing* button in order to edit and save the form (the invoice). You must save the form using a file name that represents the name of the person or the name of the company that is receiving this invoice/form (i.e. invoice for J Smith or XYZ Corp).
- Complete the Invoice Sample form by entering the pertinent information.
Enter the *Date, the Sponsor's name, the name of the Corporation, the Street address, and City, State Zip*. This is the mailing address for the invoice.
 - a) The next field is the description of their sponsorship. Provide detailed information such as the event, the event date, etc.
 - b) Indicate the *Amount* that will be sent/paid, i.e. \$2,500.00
 - c) Provide the *Remittance information* (c/o Name & Address) of the person that will receive the check. If you prefer you can use the GHWC P. O. Box 350684 Palm Coast FL 32135 information instead of your address as the remittance address. Note: If you use the P.O. Box, communicate this to the Treasurer to ensure timely retrieval of remittance checks.
 - d) Save the invoice/form using the name of the person or the name of the company that is receiving this invoice/form (i.e. Save As "Invoice for J Smith" or Save As "Invoice for XYZ Corp"). Do not Save the file that you opened, this is the sample.
 - e) If you're sending the invoice via email, compose your email and send the invoice that you just saved as an attachment. It is strongly recommended that the 2nd VP is copied on all invoicing emails. The invoice can always be printed, mailed or hand-delivered.
 - f) It's recommended that a copy of the invoice is saved on Dropbox. The 2nd VP should do this provided she's copied on the email as recommended on the previous step. The purpose of saving the invoice is reference on future events and communications.

Example of what the Invoice should look like



GRAND HAVEN WOMAN'S CLUB

INVOICE

August 25, 2023

Mr. John Smith
XYZ Corporation
00 Forever Street
Palm Coast, FL 32137

XYZ Sponsor for ABC Event with Grand Haven Woman's Club for 2023-
2024 Club Year

Amount: \$2,500

Please remit to:
Grand Haven Woman's Club
c/o Your Name
123 Anystreet Street
Palm Coast, FL 32137

Thank you for your support
