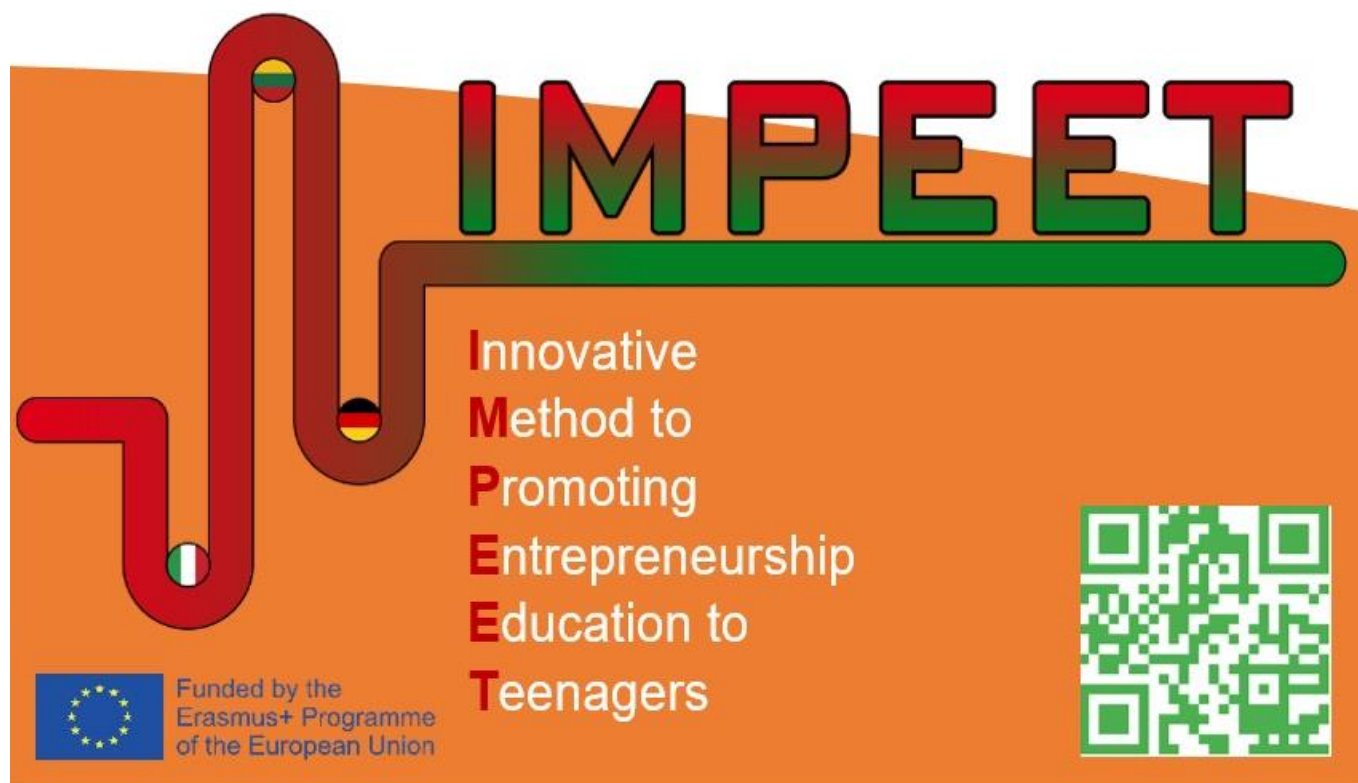


# Practice Kit for Practice Enterprise Students



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## 1. THE GENERAL INTRODUCTION TO THE PRACTICE ENTERPRISE METHOD

**Dear students,**

This Handbook will help guide you through all the different departments in a Practice Enterprise (will also be referred to as PE) and will assist you in the different tasks and give you tips.

Try out your ideas and learn how to become a successful young entrepreneur. At the same time, do not forget to care about your colleagues and make the PE classroom a fun and safe space for everyone.

In the PE class – it is the you the students who are your own bosses now. The main aim is to focus on the learning-by-doing and trial-and-error are the best way to learn!

**Enjoy it!**

- ✓ Under the guidance of a teacher, students create their Practice Enterprises from creating a product, production and distribution to marketing, sales, human resources, accounting/finance and web design.
- ✓ There is no actual transfer of real goods and money but the trade transactions and financial exchanges take place for real: orders are made, invoices issued and payments transferred, financial records maintained, including information about creditors, debtors etc.
- ✓ The names are different in each country (ex. Practice Firm, Training Firm, Virtual Enterprise), as well as their translations (ex. Entreprise d'entraînement, Übungsfirma, Empresa Simulada), however the way of learning remains the same.
- ✓ The different sections represent the different departments of a business such as reception, purchasing, human resources, operations and marketing.
- ✓ The PE approach emphasizes learning in four key areas applying the learning-by-doing methodology. It encourages cooperation, responsibility for own work and the experience is realistic and reflective. Students experience the consequences of their decisions and apply that learning to future challenges.

**A Practice Enterprise is a student-run company that works like a real business. It carries out a real enterprise's business procedures, products and services. A Practice Enterprise is like a real company in its form, organisation and functions.**

## 1.1. Vocabulary of Terms

### 1.1.1. Terms in PE Network

<ul style="list-style-type: none"> <li>○ <b>Practice Enterprise Trainees/ Students</b></li> <li>○ -are the “employees” and “manager” of their business and work in teams,</li> <li>○ -the tasks are required by a PE department: Finance and Purchasing, Administration, Human Relations, Sales and Marketing.</li> <li>○ -Students work in each department or in a specific department.</li> <li>○ -learn the business procedures – tasks and skills required to ensure their business is working successfully.</li> <li>○ -complete a wide range of tasks,</li> <li>○ -learn the importance of teamwork, business communication and planning, goal setting, time management.</li> </ul>	<ul style="list-style-type: none"> <li>○ <b>Practice Enterprise Trainers/ Teachers</b></li> <li>○ the role of a workplace coach or mentor,</li> <li>○ -helps with the PE activities: motivating, challenging and supporting the students – their role and responsibilities are often very different from their usual learning activities,</li> <li>○ -initially the teacher takes a strong role in directing and structuring the PE activities,</li> <li>○ -later on, the teacher slips into a supportive role,</li> <li>○ -supervises the PE-work of students: they are taking responsibility for their own learning, development and business tasks as well.</li> </ul>
<ul style="list-style-type: none"> <li>○ <b>EUROPEN-PEN International – Coordination Centre</b></li> <li>○ -the Practice Enterprise Network,</li> <li>○ -connects the PEs from all over the world, in more than 40 countries,</li> <li>○ -allows students international trading and have business contacts in different countries,</li> <li>○ -aim: to help students learn business and entrepreneurship skills through an engaging PE methodology “learning by doing”.</li> </ul>	<ul style="list-style-type: none"> <li>○ <b>The Practice Enterprise Way</b></li> <li>○ -the concept is developed by EUROPEN-PEN International with national Central Offices and local education and training institutions in various countries,</li> <li>○ -a national Central Office is established in each participating country to find out the needs of the local environment</li> <li>○ -It adapts the curriculum to meet the national education standards in terms of competences</li> <li>○ -Training is also adapted to suit the different target groups according to age, social and educational background and best practices</li> </ul>
<ul style="list-style-type: none"> <li>○ <b>National Central Offices</b></li> <li>○ established in countries that have a national network</li> <li>○ Staff provide all important government functions and support operations, which create a complete economic simulation in the country</li> <li>○ some services offered which are expected to be accessible to the business world, like virtual banking, customs and taxation, utilities and a post office.</li> <li>○ - it is also responsible for training trainers, the national database, the banking system and online connections between national and global PEs.</li> </ul>	<ul style="list-style-type: none"> <li>○ <b>Business Mentors</b></li> <li>○ -a company that comes from the real business world,</li> <li>○ -helps the PE as business mentor: Gives advice and ideas to the teachers and students about the processes and how a business is run,</li> <li>○ -can provide the real-world products and services for sale within the practice environment,</li> <li>○ -in some cases, they are involved in the evaluation process of the students.</li> </ul>

### 1.1.2. Main Business Terms











<b>Accounting</b>	a system that provides quantitative information about finances.
<b>Assets</b>	the value of everything a company owns and uses to conduct their business.
<b>Business</b>	an organization that operates with the intention of making a profit.
<b>Business to Business (B2B)</b>	one business sells goods or services to another business.
<b>Business to Consumer (B2C)</b>	a business sells goods or services directly to the end user.
<b>Contract</b>	a formal agreement to do work for pay.
<b>Depreciation</b>	the degrading value of an asset over time.
<b>Entrepreneur</b>	someone who organizes, manages and takes on the risk of starting a new business.
<b>Expense</b>	money spent on supplies, equipment or other investments.
<b>Finance</b>	the management and allocation of money and other assets.
<b>Fixed Cost</b>	a one-time expense that doesn't vary with business volume.
<b>Industry</b>	a category of like businesses.
<b>Inventory</b>	goods that are ready for sale.
<b>Invoice</b>	a document that records a transaction between a buyer and a seller
<b>Liabilities</b>	the value of what a business owes to someone else.
<b>Management</b>	the act of organizing and conducting a business to accomplish goals and objectives.
<b>Marketing</b>	the process of promoting, selling and distributing a product or service.
<b>Net Income/Profit</b>	revenues minus expenses.
<b>Net Worth</b>	the total value of a business.
<b>Product</b>	something produced or manufactured to be sold; a good.
<b>Profit Margin</b>	the ratio of profit divided by revenue displayed as a percentage.
<b>Revenue</b>	the entire amount of income before expenses are subtracted.
<b>Sales Prospect</b>	a potential customer.
<b>Service</b>	work done for pay that benefits another.
<b>Supplier</b>	an organization that provides supplies to a business.
<b>Target Market</b>	a specific group of customers at which a company aims its products and services.













## 1.2. Company Philosophy (Based on Inspire Principles)

In order to have a trusting and safe working atmosphere in a Practice Enterprise and to make everyone feel comfortable we all need to follow the INSPIRE strategies. INSPIRE program with its seven strategies aims to:

- Create a safe, stable and caring environment and relationship with other people for all children and adolescents.
- Work with parents, teachers, social workers and all adults to create a peaceful future for generations to come.
- Stop all kinds of violence against boys and girls.

Recommendations:

INSPIRE Strategy	Target	Actions, tasks, examples
Laws that protect children and young people from violence	Know the law: UN Conventions on the Rights of the Children National rights for children Law of one's own school	 A PE has rules to follow which are based on non-violent, safe and caring principles – these are hung up in the classroom for you to see.  The UN children's rights should be hung up in a clearly visible place in the PE.  Get to know the school laws.  Cooperate with the student council.
Standards and values	Develop and maintain standards and PE culture, building and promoting non-violent, respectful and positive relationships.	 Respect others in their opinions and ideas.  PE functions on the basis of cooperation, valuing relationships, communication and mutual respect.  There is inherent gender, culture and religion equality and everyone receives and equal chance to express their opinions and to work in a positive environment.  Develop joint agreement of PE rules and also how these are maintained.  Make sure that PE rules will make you feel comfortable and safe, e.g. through good behaviour, communication, good cooperation and community spirit.  The rules should be signed by all employees of the PE and published in a clearly visible manner in the PE room.

Safe environment	PE employees feel safe from physical and mental abuse and work in a positive and pleasant environment.	  	<p>Design your workplace and the room in a nice way, observe the guidelines of occupational health and safety.</p> <p>Friendly workplaces for employees, creating an atmosphere of cooperation and teamwork</p> <p>This atmosphere can be created by student seminars with social workers, in which their own desires and conceptions are compiled. This also teaches you to respect the wishes and ideas of other employees.</p>
Parental support and childcare facilities	The main objective: Good and trusting communication with the parents and other caregivers, e.g. social workers, should help to support the PE.	  	<p>You, parents and teachers create a safe, productive and engaging environment within the PE classroom</p> <p>Regularly present the PE work to your parents: the work and the results. These are celebrated together.</p> <p>Possibilities: Open PE Day, joint activities, design materials, information flyers or campaigns, celebrations on specific occasions. An information day or evening can be prepared together.</p>
Responsible personal finance management	Learn about economic processes and implementing expectations of employees at the workplace and in the company.	   	<p>The PE environment encourages learning about finance, trade and helps you to orientate yourself in the world of economic knowledge that can be used in personal life as well.</p> <p>Writing job descriptions for PE workplaces, conducting job interviews, visiting banks and companies, organising participation in PE trade fairs, compiling catalogues and advertising materials, presenting and discussing business ideas, exchanging ideas with other PE, e.g. in video conferences.</p> <p>Which tasks are there in your company? E.g. personnel department, warehouse, sales, accounting... design the departments e.g. with posters and visualize the respective tasks.</p> <p>Where can you get information about the economic and business context? E.g. visit your mentoring company, invite a representative of a bank or financial institution to learn more about income and economic processes.</p>
Help and support	Children and young people receive help to discover their strengths and talents and promote them.	 	<p>Parents are involved in the cooperation of the PE and are invited to follow your progress – exhibitions, workshops and different celebrations.</p> <p>Social workers have special programs to discover strengths and talents, and local clubs can help promote these talents.</p>

		<p>✓ Discuss regularly in your PE how you can improve your work: What does the individual need to be able to work well?</p> <p>✓ Design simple questionnaires to give constructive feedback to the trainer and the PE.</p> <p>✓ How can the results be communicated and improvements implemented together?</p>
Education and life skills (Ability to shape one's life)	Strategy "learning by trial-and-error", with constructive criticism. Building up self-confidence, trusting people with whom an individual way can be found and designed.	<p>✓ Trial-and-error is the best way to learn and get experience from others.</p> <p>✓ Innovation, creative work and individual approach to highlight the talents of each and every one of you is encouraged.</p> <p>✓ Looking for the solution to problems, constructively criticizing employees, helping to improve mistakes, regular feedback, encouraging employee discussions.</p> <p>✓ PE encourages non-violence and respect. Good stories are highlighted and visualized.</p> <p>✓ How do you deal with mistakes? Who takes over which tasks if a department cannot be filled? Are you able to express constructive criticism? Are you punctual and reliable? How do you deal with emotions? How do you act in critical situations?</p> <p>✓ The company philosophy is a creative process for you – you students establish it yourselves and see what really is important and valuable. Once again – all based on mutual respect, non-violence and understanding.</p>

**It is very important for the concept of practice enterprises to use the INSPIRE strategies as a basis for cooperation.**

**If you want to discover more, follow these links:**

<https://www.unicef.org/media/60981/file/convention-rights-child-text-child-friendly-version.pdf>

[https://www.who.int/violence\\_injury\\_prevention/violence/inspire/INSPIRE\\_ExecutiveSummary\\_EN.pdf](https://www.who.int/violence_injury_prevention/violence/inspire/INSPIRE_ExecutiveSummary_EN.pdf)



## 2. KNOW YOUR EMPLOYEES AND COMPANY

### 2.1. Benefits of knowing yourself and your partners

**You are going to participate in a Practice Enterprise. It is very important to know each other and yourself. Why? It can help solve the problems that arise, deal with different issues and keep creatively working together. Creating a safe, stable and caring environment and relationships with other people for all children and adolescents is very important. Work with parents, teachers, social workers and all adults to create a safe stable future for generations to come.**

**Knowing yourself better gives you a lot of benefits.**

- ✓ Better decision-making. You can make better choices about everything, from small decisions to big decisions.
- ✓ Self-control. When you know yourself, you understand what motivates you to resist bad habits and develop good ones. You'll have the insight to know which values and goals activate your willpower.
- ✓ Resistance to social pressure. When you are grounded in your values and preferences, you are less likely to say "yes" when you want to say "no."
- ✓ Tolerance and understanding of others. Your awareness of your own difficulties and struggles can help you empathize with others. Self-awareness is important for tolerance of others.
- ✓ While discussing with other students and teachers, and sharing your discoveries about yourself, you will find out how similar and how different we can be. Differences make our world more interesting, so let's get to know each other.

### 2.2. Classroom rules and agreements

While working in the PE, everyone meets different challenges and must deal with his or her own personality, environment and maintain positive relationships with others. It is necessary to have some rules, which everyone agrees to be important.

Here is an example of a set of rules of a PE:

Rules for Environment Protection	Rules for Self-respect	Rules for Relationships
<ul style="list-style-type: none"> <li>• I leave the room clean</li> <li>• I save the electricity</li> <li>• I use materials only if I really need to</li> </ul>	<ul style="list-style-type: none"> <li>• I concentrate on the task</li> <li>• I finish the task</li> <li>• I have my goals</li> <li>• I use time wisely</li> </ul>	<ul style="list-style-type: none"> <li>• I respect others</li> <li>• I am helpful and cooperative</li> <li>• I participate and do not distract</li> <li>• I communicate in a positive way</li> </ul>

- ✓ Maybe you would like to add some rules to make your Practice Enterprise and working together more effective?
- ✓ What if someone in your Practice Enterprise does not follow the rules?
- ✓ What kind of consequences can be expected?

### 2.3. Questions about you

Answer **questions about you**. Discuss the answers with other students and your teacher.

**Read these statements. Think if they are true about you and tick the right box.**

Statements	never	sometimes	often	always
I am aware of things that may distract me. I can ignore the things that distract me. I can think of my way to manage my distractions. I can quickly settle back into learning after an interruption.				
I recognize that learning can sometimes be a struggle. I can stay focused and keep going even if I find things challenging. I can learn from my mistakes.				
I can identify the mistakes I have made. I can ask people to help me learn from my mistakes. I can change my plans if I need to.				
I can bring the correct equipment to the right lesson. I can get to the right place at the right time. I can plan the next steps I might need to take in my learning.				
I can perform math calculations and work with geometric figures, sizes and measurements. I can identify some useful computer programmes and use them. I can use the Internet and the Email. I can identify and use tools and devices for computers – printers, scanners.				

I can respect other people's ideas. I am able to make compromises. I can share my ideas. I can encourage other people. I can take an active role within a group.				
I am curious about things and people. I can practice a question in my head before asking it. I listen carefully so that I can ask relevant questions. I am not afraid of not knowing.				
I can show someone I am listening by looking at them. I can pay attention to people. I can answer questions on what I have been listening to. I can take turns to speak.				
I can be relied upon. People can trust me. I can be independent. I can get straight on with what I have been asked to do.				
I am happy to take risks in my learning. I can use my imagination by letting my mind explore ideas. I can come up with new ideas.				

**Some more questions for knowing yourself and your friends better. Answer, share and discuss.**

- ✓ What do you like to do in your free time?
- ✓ Which classes do you prefer and why?
- ✓ Do you have a role model? Who is he or she?
- ✓ Describe your favourite teacher.
- ✓ What types of things do you do, or would you do in your favourite class?
- ✓ How do you organize your room/ locker/backpack?
- ✓ Do you get good grades in school? Do you think you could improve? Explain.
- ✓ If you had a choice not to come to school, would you come? Why/ Why not? Explain.
- ✓ What sports or activities have you participated in?
- ✓ What activity do you plan to join in this school or at the youth club?
- ✓ What are your greatest talents?
- ✓ If your teacher needed your help to do something, what would it be?
- ✓ Which do you like more - group work or individual work? Explain.
- ✓ If you could have a superpower, what would it be. Why?

### 3. COMPETENCIES BASED TRAINING IN PE

#### 3.1. IDEAS AND OPPORTUNITIES - SET UP/CHANGING OF PE ACTIVITIES

This section answers the question - how to create PE and register at the national Central Office.

##### 3.1.1. PE product, type, name, contact and logo

In order to start your PE, you have to decide:

- The product you want to develop (manufacturing, trade or services).
- Type of your PE (Individual enterprise, Ltd., Public limited company or other type).
- Name of company, helping to identify the PE.
- The PE Logo, which is intended to represent the Enterprise and its activities.
- The contacts preparation.

Recommendations:

- ✓ The Name has to be easy to pronounce, straightforward, catchy, well representing the PE;
- ✓ Has to match the official country rules for the symbolic name of companies and local language rules.
- ✓ Take into consideration your own wishes, local PE network existing activities.
- ✓ **Logo** is a small image – a picture, drawing or a symbol that identifies the Enterprise. The PE logo should be clearly and easily recognizable and give a comprehensive idea of the PE. It is put on all the Enterprise documents together with necessary details – Enterprise name, address, phone/fax number and more.
- ✓ PE email is the main communication tool. PE email has to be easily recognizable for the other contacts, for example in this simple form: pename@gmail.com

*Here is an example taken from Confetti Panfilo Serafini PE, Italy*



<https://www.microsoft.com/en-us/p/logo-maker-logo-creator-generator-designer/9pmqwlp0vp?activetab=pivot:overviewtab>

### 3.1.2. A PE Catalogue and a price list

**The PE Product Catalogue is a detailed list of all the goods, products and services offered by an enterprise. At the end of catalogue, the price list has to be attached. Product catalogue contains:**

- **All the data and details related to the PE (logo, name, address, contact: phone number, email address, website, webshop...).**
- **PE Products (product images, descriptions, specifications, reference, sale prices, sale units, VAT%...).**
- **Sales terms and conditions, bank details.**

#### Recommendations:

- ✓ The PE product catalogue should be constantly updated, usually every year.
- ✓ When the PE catalogue is ready, it is useful to make it known to other PEs, sending it as a .pdf attachment to an email.
- ✓ In case of international commerce, the PE catalogue should be bilingual at least (national language and English).
- ✓ Special product catalog could be prepared for special occasions, such us: PE Fair, Easter, New Year, etc.
- ✓ Price list is a document containing the names of all the goods, products and services offered by an enterprise. It also contains the related sale prices.
- ✓ The PE price list is very useful as a reference both for the PE and customers. It could be prepared using MS Word or MS Excel.
- ✓ The PE price list should be constantly updated.
- ✓ You have to consider real product prices (products' prices have to be close to real prices).
- ✓ It is important to have original design and good quality (important at trade fairs or other kinds of competitions).
- ✓ Please select clear and simple structure, all required information (name, year, logo, contacts) has to be in the catalogue.
- ✓ Create empty products' order sheet for customers.
- ✓ For the routine trade between PEs it is more useful to have an online version.

## Catalogue Example:

### Catalogue page

### Contact page


Product name

Product description

Product image

Table with details: packaging, reference, price, VAT%

Prodotto	Item
AVOLIA MANDORLA *****	AVOLIA ALMOND *****
Mandorle avvolte da strati di finissimo zucchero. Sono confetti classici, tradizionali, indicati per festeggiamenti e cerimonie.	Almonds coated in layers of extrafine sugar. They are traditional and classy "confetti", especially meant for ceremonies and celebrations.



Unità	Codice	Prezzo	IVA %
Unit	Reference	Price	VAT %
Kg	C100	€ 24.00	10%
100 g	C103	€ 3.00	10%
Confezione / Packet			

CONTATTI

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<http://www.serafiniconfetti.altervista.org>  
<http://serafinicanlies.esy.es>

<http://www.catalogoserafini.weebly.com>

### "About us" page

### Sales terms and conditions

**CHI SIAMO**

Siamo l'impresa Simulata "Confetti Panfilo Serafini s.r.l.". La nostra impresa aderisce ad EUROPEAN / PENINTERNATIONAL, la rete internazionale delle imprese virtuali. La Confetti Panfilo Serafini s.r.l. ha sede a Sulmona, in Abruzzo, in Italia centrale, presso la Scuola Media Statale "Panfilo Serafini" dell'Istituto Comprensivo "Serafini-Di Stefano". L'impresa è stata fondata nel 2002. L'impresa si occupa della commercializzazione di BOMBONIERE, CONFETTI e altri prodotti dolci tradizionali fatti con confetti, FIORI, FRUTTA, ANIMALI, FANTASIE, COMPOSIZIONI e CESTI. I prodotti offerti dalla nostra impresa sono di altissima qualità e realizzati nelle migliori aziende specializzate e nei laboratori artigianali di più antica tradizione confettiera. Nella nostra tradizione, i confetti si accompagnano alle BOMBONIERE, costituite da oggetti di classe e di elevata qualità. La nostra Simulimpresa ha scelto, sin dalla sua costituzione, la partecipazione alle Fiere Internazionali delle Imprese Simulate quale elemento fondamentale di politica aziendale. Finora abbiamo partecipato a 14 Fiere Internazionali e la nostra impresa ha sempre ottenuto risultati lusinghieri. L'elevata qualità dei nostri prodotti e la competenza dei nostri dipendenti è stata apprezzata dalle giurie e dal pubblico, come testimoniano i numerosi premi e riconoscimenti internazionali ottenuti. La nostra impresa è in possesso della CERTIFICAZIONE INTERNAZIONALE EUROPEA DELLA QUALITA' interrottamente dal 2004.

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**ABOUT US**

We are "Confetti Panfilo Serafini s.r.l." - Practice Firm. Our Firm is a member of EUROPEAN / PENINTERNATIONAL, the international network of virtual business. "Confetti Panfilo Serafini s.r.l." is based in Sulmona, in the Abruzzo region, in central Italy, where it was established at Scuola Media Statale "Panfilo Serafini", Istituto Comprensivo "Serafini-Di Stefano" in 2002. We are a real sale company. We sell the traditional Sulmona candies called "CONFETTI" - sugared almonds, and more items such as flowers, little animals, bouquets and baskets prepared with "confetti". Our company also sells "bamboniere" which are "confetti" boxes, favours and gifts for ceremonies, parties and celebrations. We rely on the cooperation of artisan craft specialists and workshops. Skilled artisan confectioners prepare the items we sell that is why they are of very high quality. We use our classical and traditional "confetti" to prepare "bamboniere" gifts for anniversaries, parties and celebrations. They are elegant and refined items made from china, silver, gold, crystal and valuable materials. Our company has been in 14 International Fairs, both in Italy and abroad, so far and has achieved very brilliant results. Thanks to the excellence of our products and the skills of our employees, we have achieved important goals and won many international prizes and awards. We have been a QUALITY PRACTICE FIRM since 2004.

CONDIZIONI GENERALI DI VENDITA	SALES TERMS AND CONDITIONS
<b>1. ORDINI D'ACQUISTO</b> L'impresa accetta ordini d'acquisto via posta cartacea, telefono, fax, e-mail, internet. <b>2. PREZZI</b> I prezzi si intendono IVA esclusa. L'iva si applica alle sole transazioni nazionali. <b>3. SPEDIZIONE</b> I costi di imballaggio e di spedizione sono compresi nel prezzo. <b>4. CONSEGNA</b> La merce sarà consegnata entro 30 giorni dalla ricezione dell'ordine. Evasioni parziali o ritardi di consegna saranno comunicati tempestivamente. <b>5. RECLAMI</b> Non saranno accettati reclami oltre 7 giorni dalla data di consegna. Articoli difettosi saranno sostituiti entro 30 giorni. <b>6. MODALITA' DI PAGAMENTO</b> Rimessa diretta, rimessa bancaria, bonifico bancario, assegno: 30 gg. data fattura.	<b>1. ORDERS</b> Orders are accepted by post, telephone, fax, e-mail, the Internet. <b>2. PRICES</b> Prices do not include VAT. VAT is not applied in international trade. <b>3. SHIPPING</b> Packaging and shipping charges are included. <b>4. DELIVERY</b> Goods will be delivered within 30 days from order date. Information will be sent in due time in case of partial deliveries or delivery problems or delays. <b>5. CLAIMS</b> Claims will not be accepted after 7 days from delivery date. Defective items will be replaced within 30 days. <b>6. PAYMENT TERMS</b> Cash orders, international cheques, bank transfers: 30 days from invoice date.
<b>DATI BANCARI</b> Banca Gruppo Bancario Centrale Cassa di Risparmio di Ferrara IBAN: IT44 K061 5513 0000 0000 0151 552	<b>BANK DETAILS</b> Bank Gruppo Bancario Centrale Cassa di Risparmio di Ferrara IBAN: IT44 K061 5513 0000 0000 0151 552
<b>NUMERO PARTITA IVA</b> 04711235290	<b>VAT NUMBER</b> 



## PRICE LIST

Valid from day/month/year  
to day/month/year

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Via A. Volta, 9  
67039 SULMONA AQ Italy

Phone / fax +39 0864 55215  
Webshop [www.serafiniconfetti.altervista.org](http://www.serafiniconfetti.altervista.org)  
Website [www.icserdistefano.altervista.org](http://www.icserdistefano.altervista.org)

### PRODUCT CATEGORY : CONFETTI CANDIES

Product name	Unit	Reference	Price	VAT %	Notes (if needed)
Lilac <u>Chocoalmond</u>	100 grams packet	C01	€ 2,50	10%	
Coconut <u>Chocoalmond</u>	100 grams packet	C02	€ 2,50	10%	

### PRODUCT CATEGORY : CONFETTI FLOWERS AND COMPOSITIONS

Product name	Unit	Reference	Price	VAT %	Notes
Orchid	Each	F01	€ 8,00	22%	
Dragonfly	Each	F02	€ 6,00	22%	

### PRODUCT CATEGORY : FAVOURS and GIFTS for CEREMONIES and CELEBRATIONS

Product name	Unit	Reference	Price	VAT %	Notes
Organza bag	Each	B01	€ 10,00	22%	
Placeholder Daisy	Each	B02	€ 6,00	22%	

If you want to discover more, follow these links:

<mailto:https://products.office.com/en-us/publisher>

<mailto:https://www.microsoft.com/en-us/p/catalog-creator/9n9583q8tq1l?activetab=pivot:overviewtab>

### 3.1.3. Registration at the national Central Office of PEs

**Work in a PE is only possible if it is part of a network of PEs, so that a market situation can be simulated. Additionally, it is imperative that the national CO simulates the most important authorities. When the PE is ready to trade with other Practice Enterprises, it has to register at the national Central Office. You should contact the CO in your country, asking about registration procedures, documentation needed.**

**The main documents:**

- **Preparation of PE documents for registration.**
- **Official forms for Registration at CO**
- **Official forms for taxpayer, value added taxpayer, etc.**
- **Official forms to open bank accounts.**
- **Other templates/forms.**
- **Software.**

Recommendations:

- ✓ The CO team is composed of highly trained and experienced professionals: lawyers, business and economics experts – partners. They can provide advice on how to register all types of companies in a country, how to register a logo in the State Patent Bureau, how to open a bank account or to get credit for the business.
- ✓ CO functions can vary in different countries and may be some of the following: Registry Agency, Tax Office, State Social Insurance, Post Office, Customs, and other authorities.
- ✓ It is important to open a bank account. Bank accounts are means to dispose of monetary funds and to handle a variety of the company's financial matters.
- ✓ View information on the CO website and contact them. Do not be afraid to write emails to the Central Office and ask questions. Don't forget to introduce yourself (as an employee of the company).

Practice Enterprise trainees have to know what the national CO is and what kind of services they provide. All PE Central Offices contacts in the world can be found on the website of the Coordination Centre of the international Practice Enterprise network: <https://www.penworldwide.org/>



**Keywords for IDEAS AND OPPORTUNITIES - SET UP/CHANGING OF PE ACTIVITIES:**

Practice Enterprise (PE)	Company registration
Company type	Company logo
Company activity	Company name
Company contacts	Company departments
Company director	Head of departments
Employees	Registry Agency
Product	Tax Office
Catalogue	State Social Insurance
Website	Post Office
Price list	Customs
Central Office	State Patent Bureau
Bank	Bank account
Credit	Taxes for PE registration
Taxpayer	Value added taxpayer

**Self – check questions:**

- ✓ Is your PE name modern and well developed – representing your business?
- ✓ Why did you choose this type of company?
- ✓ Do you know where to register your PE?
- ✓ Why does your PE have to create a LOGO?
- ✓ Do you know how to register your PE at a national CO?
- ✓ Do you know your PE contact information: email, post address and other contacts?
- ✓ Which components are important in the catalogue?
- ✓ Do you know the CO functions?
- ✓ What do you need to open a bank account for?

### 3.2. RESOURCES – PREPARATION OF WORK IN A PE

To follow all inside procedures, prepare company documents and be ready for the trade with other Practice Enterprises, there are documents, templates, forms and sheets used in different PE departments and offices presented in this section.

#### 3.2.1. Front office documents

The Front office performs the task of connecting the PE with the external world – national and international -PEs. The Front Office staff manage the communication between the PE office departments and the outside.

They are responsible for:

- Switchboard management – Commitments Agenda
- Incoming / outgoing documents (fax / mail / emails)

#### Recommendations:

- ✓ If the staff requested by a phone call is not present, the details of the call should be written down on a **Commitments Agenda** for future action. This could be a **paper register** or a **....docx file** (MS Word) or an **.xl file** (MS Excel). Every call should have the following details: ***date, PE – person calling, phone /fax nr, reason –subject, internal office – staff, any notes, person who received the call.***
- ✓ It is mandatory to keep track and copy of every PE document and activity. All paper and electronic mail must be registered and stored for future reference. The **PROTOCOL REGISTER** can be a paper register or it can be prepared on an .xls (Excel) file or on a ..docx (Word) file. It is divided into two parts, the first one for INCOMING documents, the second one for OUTGOING mail.

#### **Example of COMMITMENTS AGENDA**

Nr	Date	From PE Person	Tel. Fax email	Reason Subject	Internal Office/Staff	Notes (if needed)	Receiver
1	07.11.19	Fiorsal srl	0521 533451 fiorsal@simulimpresa.com	Purchase order 12 / 01.11.19	Purchase Paolo Rossi	Urgent reply	XXX YYY
2	07.11.19	Estyle srl	051 821832 estyle@simulimpresa.com	Invoice 15 Expired 24.09.2019	Treasury Aldo Carli		XXX YYY

### Example of INCOMING MAIL

Protocol Number	Date	Kind	From	Tel. Fax nr email	Subject	Notes (if needed)	Employee's name
0	15.11.19	fax	IGT PE Milan	igt@simulimpres sa.com	Purchase order	Italian	Xxx Yyy
1	19.11.19	email	Shanghai Bavaria n Trade CO. LTD	<a href="mailto:practicecompany@163.com">practicecompany@163.com</a>	Reopening offer	English	Xxx Yyy
2	29.11.19	email	Send@smile	b01ses@pf.cofep.be	Black Friday offer	English	AAA BBB

### Example of OUTGOING MAIL

Protocol Number	Date	Kind	To	Subject	Notes (if needed)	Employee's name
1	16.11.19	email ABC@simulimpres.com	ABC Turin - IT	Invoice nr.11 / 08.11.19	Italian	Xxx Yyy
2	16. 11.19	email furleirunplugged@gmail.com	Unplugged Inc. New York USA	Purchase order 15/ 12.11.2019	English	Xxx Yyy

### 3.2.2. Human resources office documents

**The Human Resources Department manages the PE staff and deals with various aspects of employment: recruiting, hiring, organization, working hours, payment and more. They collect documents and record information about staff, organizing and storing all employees' files.**

**Main documents:**

- **Curriculum Vitae.**
- **Hiring letter.**
- **Entry/Exit signatures sheet template.**
- **Working hours on a monthly basis.**
- **Minutes of Staff meeting**

Recommendations:

- ✓ In the startup phase the PE staff must be hired so they complete a form, the CV, providing their data. Students could be invited to “invent” some of their own details, for example in the fields of Education, Skills or Previous Experience. Of course, if some of the requested details cannot be provided, the related entries should be removed.
- ✓ Europass CV template is a standard Curriculum Vitae format created by the European Union and valid across all EU countries. The Europass CV template was designed with adults in mind; it can be modified and simplified according to individual needs. This official template is downloadable at <https://europass.cedefop.europa.eu/>
- ✓ To detect the time of entry and exit of every person working in the PE a simple template, for example an .xls file (MS Excel), can be prepared with the alphabetical list of the names of all the PE staff. An Entry / Exit paper register can be used instead. All sheets are stored and, at the end of each month, they are collected and used to calculate the working hours and then salary on a monthly basis for employees.
- ✓ The document for working hours calculation can be a very simple sheet (a .docx file). It contains a summary of the working hours on a monthly basis for each employee. It is filled in at the end of each working month. Based on the total number of working hours, the individual monthly salary is then calculated.
- ✓ Minutes of Staff Meetings. Generally, the PE Staff has a meeting once a month to discuss general problems and take specific decisions, for example about videoconferencing, marketing campaigns or participation at a Fair. At the end of the meeting, a member of the staff writes down the main points and the decisions made.

### Example of a hiring letter

A PE hiring letter is a job offer letter from the PE indicating an agreement between the employer – the PE, and the student/employee. It contains information and details regarding employment for the person being hired.

PE logo

PE name, address, Phone nr  
and other details

To (hired person's name, address, etc...)

Place and date

Dear XY,

After carefully examining your CV, our PE would like to offer you a position in the (*Marketing, Purchase, ....*) Office, starting on (date). Expected hours of work are (days of week and hours of work). You will be paid on a (*weekly, monthly*) basis.

Please indicate your agreement with these terms and accept this offer by signing and dating this agreement on or before (date).

Sincerely,

(Signature)

The PE Managing Director

### Example of Entry/Exit signatures sheet template

	Surname and first name	Entry time	Exit time	Date	Signature
1	Ardini Sergio	10.25	11.25	07.11.2019	
2	Cerini Adele	10.25	11.25	07.11.2019	
3	Fantini Gianna	Absent	Absent	07.11.2019	
4	.....				

### Example of Working hours and salary on a monthly basis

Fiscal Year			
	Surname and first name	Working hours per month	Salary per month in Euros
1	Ardini Sergio	30	450.00
2	Cerini Adele	25	375.00
3	Fantini Gianna	22	330.00
4	.....		

NB. The salary calculation service is carried out or by a specialized PE in the national PE network or by the National Central Office. The payment cheques are prepared by the Staff in the Human Resources office.

### Example of Staff meeting minutes

**PE name, address, Phone number  
and other details**

**Meeting nr X**  
**Date:** XX/XX/XX, **time:** XX:xx **Place:** PE Meeting Room  
**Present:**  
**Absent:**

-----

1. General Situation
2. Marketing Campaign for Carnival Period
3. New PE website
4. Participation at the International Fair in Italy
5. ....

If you want to discover more, follow these links to create a EUROPASS CV:

<https://europass.cedefop.europa.eu/>

### 3.2.3. Marketing office documents

The Marketing Office is in charge of preparing the PE catalogue and all advertising materials. These activities allow the PE products to be known to the customers and the wide public.

Main documents:

- **Customers Databases** – national and international -provide an alphabetical list of PEs.
- **Advertisement:** flyers, leaflets, catalogues, spots, commercials, video, radio ads, etc.
- **PE website, webcatalogue, webshop, social media channels (Facebook, Instagram etc.).**
- **Agreements**

Recommendations:

- ✓ **NATIONAL PEs:** Usually a list of national PEs can be found on the national database system website. The list contains all the details (name, address, email address, phone and fax numbers, VAT number, products sold, website or webshop if available, working times, etc.) about PEs operating. These can also be found in the international listing.
- ✓ **FOREIGN PEs:** A list of PEs that work internationally is accessible through the login from the national database system. It is called Clearing Center Client and offers complete and comprehensive information about PEs from all over the world in the worldwide Practice Enterprise network.
- ✓ Of course, each enterprise can create its **own Databases**. A very simple way is to use .xls files (Excel sheet), using a sheet per letter of the alphabet: page A, page B, etc.
- ✓ The flyers, catalogues and leaflets are forms of paper advertisement and they can be in print form. They can be printed in different paper format and different MS programs can be used. A very simple program is “MS Publisher” - .pub files. It is very simple to use and offers lots of different templates.
- ✓ Other forms of advertisement are in **digital format:** videos, spots, commercials and ads. They are not very long- generally 20-30 seconds to 1 minute. They can be prepared in different ways, from pictures to cartoons to videos and more. You can use programmes such as MS PowerPoint and save the project as an MP4 video project. Interesting tools can be found on the Internet and used to make spots in cartoon format, for example Powtoon. The PE students use video editing programs, from very simple ones - for example Windows Movie Maker – to more complex ones – such as Proshow Producer to edit their videos.
- ✓ Once leaflets and files have been transformed into .pdf files, you can **send as attachments** to emails to Customer PEs. Advertising flyers and leaflets can be used on lots of occasions: at the opening / reopening of PE project, when a PE is going to launch a discount campaign – on Black Friday, for example-, on special celebrations – Halloween, Thanksgiving, Christmas, St Valentine’s Day, Father’s Day, etc.
- ✓ The Internet offers powerful tools to make PE activities and projects known. In real life, real enterprises take great care of their **websites / webshops/ Facebook page** because they play an essential part in their business. For this reason, it is important for PEs to have their own website/webshop/Facebook page.

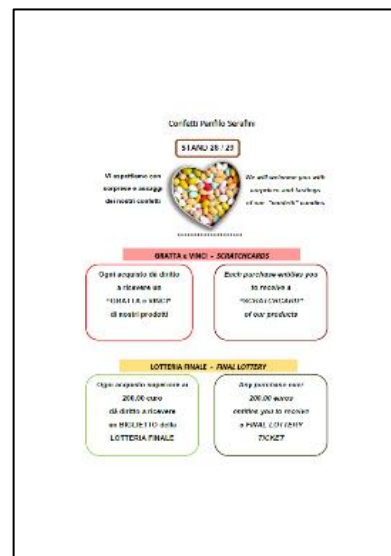
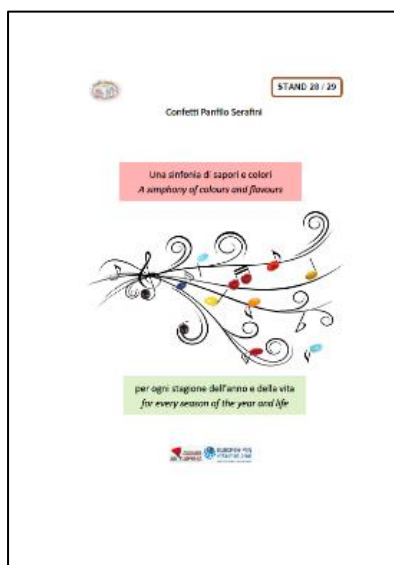
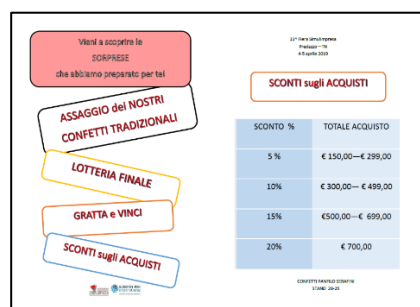
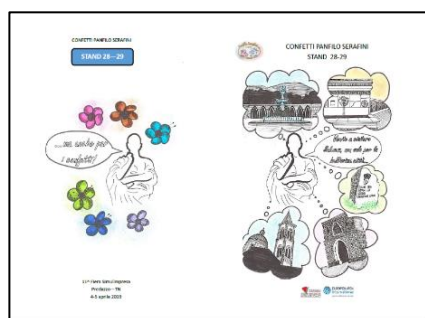
- ✓ Some sites offer **free and easy to use templates**, so building a PE website is not so difficult. Ready-made templates do not require special or wide computer programming skills. Some interesting templates can be found at [www.wix.com](http://www.wix.com) or [www.weebly.com](http://www.weebly.com) or [www.wordpress.com](http://www.wordpress.com) or [www.altervista.org](http://www.altervista.org) . They offer not only free templates but free hosting for the PE website as well.
- ✓ It could be interesting to have mutual business agreements signed with other PEs in order to expand business and enhance activities.

### Example of LIST OF NATIONAL PEs

PE name	Address	Products	Website Webshop	Email address	Phone nr	VAT nr	IBAN
Aloof sol	Via Sachi, 47 45124	Car and boat wrapping, Wall stickers	<a href="http://www.simulal.it">http://www.simulal.it</a>	a lot@ Simulimpresa. com	045 22698 9	471220 669	IT43 Q027 4231 0000 0000 5992 753

### Example of leaflets

These leaflets were made on the occasion of the PE Fair. First the students prepared drawings and pictures; then they scanned them and put them on a "MS Publisher" template. First .pub files were prepared; then they were transformed into .pdf files and printed.





Example of agreement:

Enterprise 1 logo Name Address Phone number Fax number email address Website - webshop (if available) VAT number	Enterprise 2 logo Name Address Phone number Fax number email address Website - webshop (if available) VAT number
<p><b>Mutual Commercial Agreement between <u>Enterprise 1</u> and <u>Enterprise 2</u>.</b></p> <p>Date.....</p> <p>This Agreement is made effective as of _____, by and between <i>Practice Enterprise 1</i> and <i>Practice Enterprise 2</i>.</p> <p>The aim of this Commercial Agreement is to develop and enhance the collaboration between the two enterprises.</p> <p>The two enterprises agree on the following:</p> <ol style="list-style-type: none"> <li>1- they will place (1/2/3 reciprocal order/s);</li> <li>2- the orders will be placed every (week, fifteen days, month);</li> <li>3- the total amount of each order will be higher than X euros;</li> <li>4- .....</li> </ol> <p>Enterprise 1 <i>Employee's name</i></p> <p>Enterprise 2 <i>Employee's name</i></p>	

If you want to discover more examples, follow these links:

Example of spots can be found here: <https://vimeo.com/342481493> , <https://vimeo.com/344256455> ,  
<https://www.youtube.com/watch?v=YXfdQ2ifZHA> , [https://www.youtube.com/watch?v=d4vbh\\_s2oHc](https://www.youtube.com/watch?v=d4vbh_s2oHc)

Example and ideas can be found at [www.icserdistefano.altervista.org](http://www.icserdistefano.altervista.org) – and at [www.catalogoserafini.weebly.com](http://www.catalogoserafini.weebly.com) , which is a web catalogue

Students at Confetti Panfilo Serafini PE prepared two webshops, an Italian one at [www.serafiniconfetti.altervista.org](http://www.serafiniconfetti.altervista.org) and an English one at [www.serafinicandies.altervista.org](http://www.serafinicandies.altervista.org).

### 3.2.4. Purchasing department documents

The purchase department is established when a company needs particular stock, materials, furniture, computers, electronics or clerical items as well as items and services required for the staff. These are called **functional purchases** as they concern the specific needs of the PE. Purchases can be **non-functional** when items not strictly related to the PE and its activity are purchased. For example, a computer is considered a functional purchase; a premium holiday can be considered a non-functional purchase.

#### Main documents:

- Purchase order.
- Issued order list.

#### Recommendations:

- ✓ **Out of stock products:** When the warehouse staff report that some of the products are out of stock or under the minimum stock limit, it is necessary to buy them from the PE suppliers.
- ✓ Generally, the purchasing operations are done online. The National Central Office website offers pages, forms and lists of supplier PEs to have the operations completed.
- ✓ PEs can also use their own "Purchase Order" instead. After filling it in with all the right details, they can send it as an attachment to an email addressed to the supplier PE based at the Central Office.
- ✓ Purchase orders have numbers, so every order should be registered and listed for future reference. An .xls file (MS Excel) or a table based on ....docx file (MS Word) can be prepared.
- ✓ The present PURCHASE ORDER template can be used to order any kind of product. It is usually sent as an attachment to an email.

#### Template ISSUED ORDERS register

	Date	Protocol nr	Practice Enterprise	Notes	
1	07.11.2019	22/ 02.11.19	Officeline sas	Order 07-03915	
2	08.11.2019	25/ 04.11.19	Melae+	Order 08 / Nov3	
4	.....				

**Purchase order template:**

**Enterprise logo**  
**Name**  
**Address**  
**Phone number**  
**Fax number**  
**Email address**  
**Website - webshop (if available)**  
**VAT number**



<b>PURCHASE ORDER</b>	
<b>Reference XX. YY.ZZ</b>	<b>Date xx.xx.xxxx</b>

PRODUCTS		
REF	DESCRIPTION	QUANTITY
XX	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	xx
XY	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	xxx
XZ	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	x
XA	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	xxx

*(Employee's name and signature)*

**This document is for pedagogical purposes only.**

**It is void of any legal or fiscal effects.**

### 3.2.5. Sales department documents

The staff in the Sales Department perform the tasks of processing the purchase orders received by other PEs.

**Main documents:**

- Received order List
- Order confirmation
- Delivery note
- Invoice

Recommendations:

- ✓ Once the order has been received and the ordered products availability in the Warehouse Department has been checked, an **Order Confirmation** is sent to the customer PE. An .xls file (MS Excel) or a ....docx file can be useful to prepare an Order Confirmation template.
- ✓ A **Delivery Note** is a document accompanying the goods being shipped. It is a list containing information about the goods delivered – external aspect, weight, number, ... - if it is the case. For example, in the case of a Travel Agency PE, the Delivery Note does not contain this kind of description. Usually, a copy of the Note, signed by the buyer PE, is returned to the seller PE as a proof of delivery.
- ✓ An **invoice** is a document issued by the seller PE to the buyer PE. It is a bill. It contains a list of the products, goods or services provided by the seller and the statement of the sum due for these. An invoice is sent by the seller PE after the goods have been shipped to the buyer PE for payment. It is usually sent as a .pdf attachment to an email.

*Template RECEIVED ORDERS register*

	Date	Protocol nr	Practice Enterprise	Notes	
1	02.11.2019	14/ 02.11.19	Suishome	Order 19-03915	
2	04.11.2019	19/ 04.11.19	Sapori deZena	Order 15 / Nov3	
4	.....				

**Order Confirmation template:**

Enterprise logo
Name
Address
Phone number
Fax number
Email address
Website - webshop (if available)
VAT number



**EUROPEN-PEN**  
International  
practice enterprise network

**ORDER CONFIRMATION**

Reference xx.yy.zz Date xx.xx.xxxx

Your Order xxxx Date xx.xx.xxxx

Ref. INVOICE xxxxx Date xx.xx.xxxx

Ref.DELIVERY N. xxxxx Date xx.xx.xxxx

BUYER			
FIRM			
ADDRESS			
ZIP CODE TOWN COUNTRY			
Email			
Telephone n.		Fax n.	

Place, date

Dear Sir/Madam:

We are pleased to inform you that the items are available and that your order is being processed.  
The products will be dispatched and delivered as soon as possible.

Yours sincerely,

Employee's name and signature

PRODUCTS		
REF	DESCRIPTION	QUANTITY
XX	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	xx
XY	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	xxx
XZ	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	x
XA	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	xxx

**This document is for pedagogical purposes only.**

**It is void of any legal or fiscal effects.**

**Delivery note template:**

Enterprise logo
Name
Address
Phone number
Fax number
email address
Website - webshop (if available)
VAT number



**EUROPEN-PEN**  
International  
practice enterprise network

**DELIVERY NOTE**

Reference xx.yy.zz Date xx.xx.xxxx

Your Order xxxx Date xx.xx.xxxx

Ref. INVOICE xxxxx Date xx.xx.xxxx

Ref. ORDER CONF. xxxxx Date xx.xx.xxxx

BUYER			
FIRM			
ADDRESS			
ZIP CODE TOWN COUNTRY			
Email			
Telephone no.		Fax no.	

PRODUCTS		
REF	DESCRIPTION	QUANTITY
XX	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	xx
XY	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	xxx
XZ	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	x
XA	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	xxx

(External Aspect) Cardboard /Metal /Plastic boxes.....

Package number: xxxxx

Total weight: xxxxx

Dimensions: (height x width x depth)

(Employee's name) XXXXXXXXXXXXXXXX YYYYYYYYYYYYYYYYYYYY

This document is for pedagogical purposes only.

It is void of any legal or fiscal effects.

**Invoice template:**

Enterprise logo  
Name  
Address  
Phone number  
Fax number  
email address  
Website - webshop (if available)  
VAT number



**EUROPEN-PEN  
International**  
practice enterprise network

INVOICE	
Reference xx.yy.zz	Date xx.xx.xxxx

Your Order xxxx	Date xx.xx.xxxx
-----------------	-----------------

Ref. ORDER CONF. xxxxx	Date xx.xx.xxxx
------------------------	-----------------

Ref. DELIVERY N. xxxxx	Date xx.xx.xxxx
------------------------	-----------------

BUYER			
FIRM			
ADDRESS			
ZIP CODE TOWN COUNTRY			
Email			
Telephone no.		Fax no.	

PRODUCTS						
REF.	DESCRIPTION	QUANTITY	PRICE	Subtotal (excluding VAT)	VAT %	TOTAL
Xxxx	Xxxxxxx Yyyy Nnnnn	xx	€ XXX,xx	€ XX,xxx	€ X,xx	€ XXX,xx
Yyyy	Yyyyyyyy xxxxx zzzz	xx	€ XXX,xx	€ XX,xxx	€ X,xx	€ XXX,xx
TOTAL 1				€ XXX,xx	€ xx,xx	€XXX,xx
DISCOUNT xx% (if applicable)						€ XX,xx
INVOICE TOTAL						€ XX,xx

(Employee's name) XXXXXXXXXXXX YYYYYYYYYYYYYYYYYY

**This document is for pedagogical purposes only.**

**It is void of any legal or fiscal effects.**

### 3.2.6. Warehouse department documents

**The Warehouse Department checks the stock of products and updates the list and quantity of products available.**

**Main documents:**

- **Printout stock template.**
- **Storage card template / loading.**
- **Storage card template/ unloading.**

Recommendations:

- ✓ The Printout Stock is the list of all the stocks, that is the goods and the products present and available for sale in the Warehouse Department. For each individual item in the catalogue, the PE sets the minimum level of stock, that is a minimum number of pieces of that item. If a single item is at the minimum stock level or below, it is necessary to purchase from the supplier PE a number of pieces to restore the level. To avoid the problem of items out of stocks, it is essential to know the exact number of available units for each of the items in the PE catalogue. This information is found on the document called "Printout stock".
- ✓ **UNLOADING PRODUCTS FROM WAREHOUSE.** Every time a sale is completed, the items sold must be downloaded from the warehouse. To do this, the number of pieces sold must be subtracted from the number of pieces in stock.
- ✓ **LOADING OF PRODUCTS IN STOCK** Once the items are at or below the minimum stock level and orders by the Purchase Department to the supplier PE have been delivered to the Warehouse Department, it is necessary to load them on a document called "Storage card". The card is a list of the items purchased by the PE from time to time. The number of the items purchased must be written down on the card after delivery. This operation allows the staff to always have the warehouse situation under control.

***Printout stock template***

	Reference	Product	Minimum level /pieces	Pieces in stock	Supplier PE	Action required
1	C100	Avola Mandorla 100 g	100	65	ABC PE	Purchase order
2	C110	Avola Mandorla 1Kg	30	80		
3	C150	Avola Dorati 100g	100	150		
4	.....	.....				



**Storage card template / loading:**

	Ref.	Product	Minimum No.	In stock (before)	No. Purchased	Date	Supplier PE	In stock (now)
1	C100	Avola Mandorla 100 g	100	65	85	11.11.2019	ABC PE	150
2	C110	Avola Mandorla 1Kg	30	80				80
3	C160	Avola Dorati 1Kg	30	20	40	11.11.2019	XYZ PE	60
4	.....	.....						

**Storage card template / unloading**

	Ref.	Product	Minimum No.	In stock (before)	No. Sold	Date	In stock (now)
1	C100	Avola Mandorla 100 g	100	150	30	22.11.2019	120
2	C110	Avola Mandorla 1Kg	30	80	10	22.11.2019	70
3	C150	Avola Dorati 100g	100	150			150
4	C160	Avola Dorati 1Kg	30	60	15	22.11.2019	45
5	.....	.....					

If you want to discover more, follow this link for a video about the Warehouse Management System:  
<https://study.com/academy/lesson/warehouse-management-systems-types-benefits.html>

### 3.2.7. Treasury office documents

The staff in the Treasury Office check and note down all the income and expenses in the current account of the PE.

#### Main documents:

- **Current Account Book / Bank**

#### Recommendations:



In the **Current Account Book** all the items – income and expenses of the PE – are noted down. It can be a special paper register or an Excel file. All PEs have their own current accounts at the Central Office Bank; this is why most of them do not fill in their Current Account Book. They check the situation of their current account by connecting online with the National Central Office which provides the bank service.

#### Current Account Book template

Date	Number	Description	+	-	Balance
25.10.2019	312	Invoice n.1205 21.10.2019 ESEL		106,99	428.762,00
29.10.2019	313	Bank expenses		0,50	428.761,50
31.10.2019	314	Invoice 22, 29.10.2019 PC Empire PE	117,88		528.939,38
02.11.2019	315	Invoice 16, 25.10.2019 EUROTECH PE	355,63		429.295,01

### 3.2.8. Accounting Office

The staff in the Accounting Office perform the task of checking the regular payment of invoices issued and received, the payment of utilities and the general situation of the PE current account.

#### Main documents:

- **Schedule management: customers.**
- **Schedule management: suppliers.**
- **Letter of reminder/ Payment reminder**

#### Recommendations:

- ✓ **Schedule management - customers:** It is a document that allows and helps PEs monitor the deadlines for the payment of bills and invoices due by customers. On the Internet different .xls (MS Excel) templates can be found, downloaded and adapted. This template is a ..docx (MS word) file. It is prepared on a monthly basis.
- ✓ **Schedule management - suppliers:** It is a document that allows and helps PEs monitoring the deadlines for the payment of bills and invoices due to supplier PEs. Templates can be found on the Internet as well
- ✓ **Letter of reminder or Payment reminder:** a letter or note sent to customers to prompt them to pay overdue invoices.

#### *Customers schedule management template*

NOVEMBER 20XX				
Payment due date	Customer	Invoice	Total amount	Notes
01.11.2019	XYZ	85 / 01.10.2019	€ 425,07	OK
01.11.2019	ABC	86 / 01.10.2019	€ 206,85	Send reminder
03.11.2019	GDF	87 / 03.10.2019	€ 1052,00	OK
07.11.2019	XYZ	88 / 07.10.2019		

#### *Suppliers schedule management template*

NOVEMBER 20XX				
Supplier PE	Invoice	Total amount	Payment due date	Notes
SIM Can	12 / 15.11.2019	€ 76,10	29.11.2019	Bank transfer
SIM Sog	04 / 18.11.2019	€ 645,00	02.12.2019	Credit card
SIM Rxz	09C / 19.11.2019	€ 1437,00	03.12.2019	Bank transfer
SIM Cba	76 / 23.11.2019	€ 112, 56	07.12.2019	

**Example of Reminder letter for customers:**

<p><b>Enterprise logo</b></p> <p><b>Name</b></p> <p><b>Address</b></p> <p><b>Phone number</b></p> <p><b>Fax number</b></p> <p><b>Email address</b></p> <p><b>Website - webshop (if available)</b></p> <p><b>VAT number</b></p>
--

Protocol number: \_\_\_\_\_

Place, Date: \_\_\_\_\_

Dear xy,

Our records indicate that we have not received your payment expiring on *day/month* and related to your order xy placed on *day/month*.

We therefore ask you to remit as soon as possible the amount of the invoice attached to this email.

Sincerely,

XXXXXXXXXXXXXXXXX YYYYYYYYYYYYYYYYYY

Treasury Office

### Keywords for RESOURCES

Commitments agenda	Invoice
Switchboard management	Delivery note
Protocol Register	Printout stock
CV – Curriculum vitae	Storage card
Hiring letter	Invoice
Order confirmation	Current Account Book / Bank
Received orders register	Schedule management
Mutual commercial agreement	Letter of reminder
Purchase order	Issued orders register
Commercial Agreement	leaflet
Customers Database	Advertisement
Flyer	Spot
leaflet	Commercial
Catalogues	Video ads
Radio ads	PE website
Webshop	Web catalogue
Contract	Facebook
Working hours	Salary
Staff meeting minutes	Incoming mail
Order confirmation	Outgoing mail

### Self – check questions:

- ✓ Do you think these documents are clear, simple and easy to use?
- ✓ Can you describe the purpose of these documents?
- ✓ Do you think they are useful for your PE activities?
- ✓ Are the documents helpful?
- ✓ Have you had any difficulties in using them?
- ✓ Do you know which documents should be used in which Department/Office?

### 3.3. INTO ACTION - LEARNING-BY-DOING IN A PRACTICE ENTERPRISE

In this section you will find all needed information to understand how documents are functioning within the company, how departments within the company are interrelated and what the company processes in the following departments and offices are: Accounting department, Human resources office, Marketing office, Purchasing office, Sales office, Front office, Treasury office, Warehouse office.

#### Recommendations:

- ✓ The PE tools help students through the learning-by-doing method, often practicing topics not yet developed in the theoretical classroom.
- ✓ For each work place there is a job description containing:
  - input: what kind of document is coming in and from where/ from whom
  - operational tasks describing what is to be done with the document
  - output – showing the results obtained from the operational tasks
- ✓ The job description belongs to the work place, with a complete rotation within the PE - all students will develop all tasks.
- ✓ The job description is an operational tool and does not provide contents.
- ✓ For each Practice Enterprise there are more task lists adapted based on different target group needs.

#### **Advice, links, other ...**

The task list is a strategic tool that guarantees the participants' operative independence from the very first moment. When writing the task list, it is necessary to check the compatibility of the logistic aspects of the practice enterprise with the flow documents and used instruments.

This tool has to be adjusted based on any eventual inconvenience met during the work, such as not enough copies for the involved offices, lack of information between offices due to wrong documents flow, etc.

### 3.3.1. Accounting department

<b>Registration of purchase invoices for VAT purposes</b> <b>Incoming information</b> - copy of the purchase invoice received from A. <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- record manually the invoice in the registry of Purchasing;</li> <li>- record on PC the bill in the file " Computerized VAT registers ";</li> <li>- affix date and your initials on the transaction.</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- Register of Purchases updated;</li> <li>- " Computerized VAT registers " file updated.</li> </ul>	<b>Registration of purchase invoices for tax purposes</b> <b>Incoming information</b> - copy of the purchase invoice already registered for VAT. <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- Record the invoice in Suppliers Ledger held by name on the PC;</li> <li>- record the invoice in First Note on PC;</li> <li>- affix date and your initials on the transaction.</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- Suppliers Ledger updated; first note updated.</li> </ul>
<b>Registration of sales invoices for VAT purposes</b> <b>Incoming information</b> - copy of the sales invoice received from V. <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- record manually in the "Issued invoice register";</li> <li>- record on PC the bill in the file "Computerized VAT registers";</li> <li>- fix date and your initials on the transaction.</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- Register of invoices (Sales) updated.</li> <li>- Computerized VAT registers " file updated.</li> </ul>	<b>Registration of sales invoices for tax purposes</b> <b>Incoming information</b> - copy of the sales invoice already registered for VAT. <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- record the invoice in Customers Ledger held by name on the PC;</li> <li>- record the invoice in First Note on PC;</li> <li>- fix date and your initials on the transaction.</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- Customers Ledger updated;</li> <li>- First Note updated.</li> </ul>
<b>Periodic payment tax</b> <b>Incoming information</b> - Register of Purchases and - Register of issued invoices; <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- input manually in the space provided for periodic payment on register of issued invoices</li> <li>- Perform the calculation of clearance on computer, considering any credit for the previous period and verifying the credit or debit VAT for the reference month;</li> <li>- put the date and your initials;</li> <li>- fill the requested form - VAT declaration;</li> <li>- store in the file "Computerized VAT registers</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- VAT Registers manually kept updated;</li> <li>- " Computerized VAT registers " file updated;</li> <li>- Copy of the clearance transmitted to T.</li> </ul>	<b>Recording payments and collections and various operations management</b> <b>Incoming information</b> - copy of the Cash Book received; - copy of the Bank Book received. <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- record in the Customer Ledger any received invoices;</li> <li>- record in Suppliers Ledger any paid bills;</li> <li>- record in First Note all collections and payments deducted from the Cash Book and the Bank Book;</li> <li>- affix the date and your signature on the copy of the Cash Book and the Bank Book you've recorded in ledgers and First Note.</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- Suppliers Ledger updated;</li> <li>- Customer Ledger updated;</li> <li>- First Note updated.</li> </ul>

### 3.3.2. Human resources office:

#### Hiring letters and employee record setup

##### Incoming information

- details of the people in the process of hiring;
- national contracts application and Privacy Policy

##### Operational tasks:

- ask the protocol number of outgoing mail to S indicating the receiver and the subject of the document you are preparing;
- type the hiring letters by using the reference SW and indicating the registration number and your initials, then print two copies;
- induce the Director signature and deliver one copy to the employee, store the other one in the file "Staff Documents";
- create an archive of data relating to Employees with the use of reference software.

##### Results:

- signed hiring letters;
- "Staff Documents" file updated and employees' database.

#### Payroll management

**Incoming information** -- hiring letters; - documents delivered by the employees concerning their recruitment or changes that occurred, stored in the file "Staff Documents."

##### Operational tasks:

- fill the Payroll reporting the data concerning the staff recruited and putting your initials.

##### Results:

- Payroll updated;
- "Staff Documents" file updated;
- record manually in the "Issued invoice register";
- record on PC the bill in the file "Computerized VAT registers";
- affix date and your initials on the transaction.

#### Creation and management of "Entry/Exit signatures sheet"

**Incoming information**- employees names. eventual employees' absences;

##### Operational tasks:

- create a document designed to detect the time of entry and exit as well as signing up for each employee (use reference software).
- write down any absent staff on "Entry/Exit signatures sheet" by putting your initials next to each record, then communicate the absence to the office of competence;
- collect the signatures of the employees indicating the time of entry and exit;
- create an "attendance sheet" for the recording of working hours, and absences per month for each dependent (use reference software)

##### Results:

- "Entry/Exit signatures sheet" file updated;
- "Attendance sheet" file updated.

#### Licenses and diseases management

**Incoming information** - employee's request for license;

##### Operational tasks:

- set up the form "Request for permission / absence" always putting your initials;

##### In the case of a permit entry / exit

- ask the applicant to fill out the form (in 2 copies)
- get the Director signature
- store the copy in the "Staff Documents."

##### In the case of illness without a medical certificate

- ask the applicant to fill out the form (in 2 copies) and get the Director signature, store the copy in the "Staff Documents."

##### Results:

- Licenses/absences form updated
- "Staff Documents" updated

#### Creation and management of the "Breaks sheet"

**Incoming information** - employees names.

##### Operational tasks:

- create a document for detecting the time of entry and exit from work for the break in the morning and afternoon, as well as signatures;
- check that the breaks are up to 15 minutes in the morning and 10 min in the afternoon and report any delays to the Director;

##### Results:

- "Breaks sheet" updated, - communication of any delay to the Director.



### 3.3.3. Marketing office

<b>Creating Practice Enterprise LOGO</b> <b>Incoming information:</b> - name, type of business and address of the PE. <b>Operational tasks:</b> - create the LOGO taking into account the activity, the territory in which it operates or the image of a symbol with which the company wants to be represented, etc.; - transmit the LOGO to the various offices to update the practice firm documentation saving it in the shared folder. <b>Results:</b> - company LOGO	<b>Sales lists management</b> <b>Incoming information:</b> - company logo; - information on the qualitative products features, etc., received from M; - goods pricing received from the Purchasing Department. <b>Operational tasks:</b> - Redact and update the price list, either in terms of product types or their sale price (even by software). <b>Results:</b> - price list
<b>Creating and Updating Product Catalogue</b> <b>Incoming information:</b> - company logo; - information on the qualitative products features, etc., received from warehouse - price list <b>Operational tasks:</b> - use appropriate tools (digital camera, PC) for the creation and processing of images to be included in the catalog; - take care of the product packaging - setup the sale conditions (transport, packaging, mode of payment and delivery); - setup in foreign languages catalog, price list and conditions of sale; - transmit the files created to foreign companies; <b>Results:</b> - updated products catalogs	<b>Creating updating customers Databases</b> <b>Incoming information:</b> - customer data received from sales and network <b>Operational tasks:</b> - use the software for the creation of two computerized databases, one for national and one for international customers with full name, address, email address, VAT number, type of products; - update the customer database computerized relatively to the type of products that are normally required; - on the basis of the above, find new products to offer, providing customized flyers and leaflets <b>Results:</b> - multimedia database of "National Customer" - multimedia Database of "International Customers"
<b>Creating the PE website and flyers</b> <b>Incoming information:</b> - company logo; - information on the structural and organizational company features; - information on the qualitative products features, etc., price lists and sale conditions <b>Operational tasks:</b> - use of applications for the implementation of the website project - use of applications for the creation and updating of the practice flyers <b>Results:</b> - PE website and flyers	<b>Quality handbook management</b> <b>Incoming information:</b> - Quality Handbook <b>Operational tasks:</b> - build the organization chart and update - distribute in a controlled way the self-assessment tables at each rotation; - store the completed questionnaires in the booklet " Employees Portfolio "; - check the correct and regular course of business procedures Results - updated organization chart and "Employees Portfolio" file updated

### 3.3.4. Purchasing office

<b>Purchase order management</b> <b>Incoming information:</b> <ul style="list-style-type: none"> <li>- List of missing raw materials;</li> <li>- List of missing products</li> </ul> <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- connect to the web page for purchases where you can find an application form on the basis of raw materials and / or products to be ordered, and the supplier in question;</li> <li>- print the form after you have filled in the necessary quantities;</li> <li>- confirm everything, submit the order form;</li> <li>- check and print the registration number with an indication of your code;</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- copy of the document to for the final registration in the Protocol registry;</li> <li>- ensure all purchases are done within budget limit of PE</li> </ul>	<b>Receipt of order confirmation</b> <b>Incoming information:</b> <ul style="list-style-type: none"> <li>- form sent to the supplier;</li> <li>- confirmation of the order</li> </ul> <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- check the data mapping between order placed and received confirmation order;</li> <li>- file the order confirmation attached to the printed form previously completed via the Web, in the "Supplier X, Y, Z, ..." file and wait to receive the delivery note and invoice.</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- confidential information</li> <li>-suppliers file updated</li> </ul>
<b>Receipt of delivery note</b> <b>Incoming information:</b> <ul style="list-style-type: none"> <li>-- order form submitted via the web;</li> <li>- received order Confirmation;</li> <li>- delivery note;</li> </ul> <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- get the delivery note from S, check the data mapping between the order submitted, order confirmation and delivery note;</li> <li>- photocopy the document;</li> <li>- send the copy to warehouse office for loading;</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- Checking incoming goods;</li> <li>- "Supplier file update.</li> </ul>	<b>Receipt of purchase invoice</b> <b>Incoming information:</b> <ul style="list-style-type: none"> <li>- delivery note;</li> <li>- Deferred invoice of purchase</li> </ul> <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- receive the invoice from S, check the data mapping between delivery note previously received and the invoice;</li> <li>- assign Numbers progressively, make copy and affix the stamp "RECEIVED ...." with the date and your initials;</li> <li>- update the summary table of all the documents received, in numerical order, by putting near your initials;</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- copies of the invoice;</li> <li>- "Supplier X, Y, Z, ..." file update;</li> <li>- "Documents of purchase" statement update.</li> </ul>

### 3.3.5. Sales office

<b>Orders receipt</b> <b>Incoming information:</b> <ul style="list-style-type: none"> <li>- Incoming order received</li> </ul> <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- test data reported in the order;</li> <li>- Open a new folder named "Customer Practice" serially numbered and registered to the ordering customer, even if order received by telephone;</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- The "Customer Practice" open and updated;</li> </ul>	<b>Information request in any discrepancy event</b> <b>Incoming information:</b> <ul style="list-style-type: none"> <li>- "Customer Practice"</li> </ul> <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- In case of discrepancy between the order received and the sales conditions normally applied by the company, phone the customer for the resolution of the case;</li> <li>- Ask the protocol number of outgoing mail to S indicating the recipient and the subject of the document you are preparing;</li> <li>- Setup the letter indicating the registration number and your initials;</li> <li>- Attach a copy of the letter to the order in the "Customer Practice ".</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- Resolution of any discrepancies;</li> <li>- The " Customer Practice " updated.</li> </ul>
<b>Delivery Note and invoice issuing</b> <b>Incoming information:</b> <ul style="list-style-type: none"> <li>- The " Customer Practice ";</li> <li>- Tabulated inventory of missing products;</li> <li>- Any promotions with discounts on the products</li> </ul> <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- Check availability of products through analysis of the tabulated inventory of missing products received from M;</li> <li>- Communicate by phone or by letter with the customer when order is not partially or totally processing;</li> <li>- Ask the protocol number of outgoing mail to S indicating the recipient and the subject of the document you are preparing;</li> <li>- Setup the accompanying letter to DDT and invoice indicating the registration number and your initials</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- DN transmitted;</li> <li>- Telephone resolution of any differences;</li> <li>- Invoice sent</li> <li>- The "Customer Practice " updated</li> </ul>	<b>Recovery of the invoice amount</b> <b>Incoming information:</b> <ul style="list-style-type: none"> <li>- The "Customer Practice";</li> <li>- A copy of Customers Schedule or notice</li> </ul> <b>Operational tasks:</b> <ul style="list-style-type: none"> <li>- Check the correspondence between the invoice amount and amount charged by the customer;</li> <li>- Update the necessary data in the "Customer Practice".</li> </ul> <b>Results:</b> <ul style="list-style-type: none"> <li>- The "Customer Practice" is closed;</li> <li>- Archive updated.</li> </ul>

### 3.3.6. Front office

<p><b>Switchboard management</b></p> <p><b>Incoming information:</b></p> <ul style="list-style-type: none"> <li>- calls coming from outside;</li> <li>- requests for phone calls from internal staff.</li> </ul> <p><b>Operational tasks:</b></p> <p><b>Phone calls coming from outside:</b></p> <ul style="list-style-type: none"> <li>- introduce the company;- introduce yourself</li> <li>- identify the company and the person who is calling you</li> <li>- forward the call to the internal office;</li> <li>- write down the details of the call on Commitments Agenda in case of receiver is absent (internal staff is not present).</li> </ul> <p><b>Requests for phone calls from internal staff:</b></p> <ul style="list-style-type: none"> <li>- research the telephone number;</li> <li>- introduce the company and yourself</li> <li>- ask for the right office you want to talk to;</li> <li>- pass the call to the office of your company.</li> </ul> <p><b>Results:</b></p> <ul style="list-style-type: none"> <li>- effective and efficient management of the telephone;</li> <li>- calls record for recipients staff.</li> </ul>	<p><b>Receiving and storing incoming documents</b></p> <p><b>Incoming information:</b></p> <ul style="list-style-type: none"> <li>- mail, emails</li> </ul> <p><b>Operational tasks:</b></p> <p>Email</p> <ul style="list-style-type: none"> <li>- connect to the email;</li> <li>- download and print (including any attachments);</li> <li>- protocol the original;</li> <li>- write down the details in the Protocol register by indicating your initials;</li> <li>- photocopy the cover or first page;</li> <li>- deliver the original with the documents to the concerned office;</li> <li>- put your signature and the date on the remaining ;</li> <li>- store the copy and related documents in the file cabinet "Inbox".</li> </ul> <p><b>Results:</b></p> <ul style="list-style-type: none"> <li>- incoming mail sorted to the concerned offices;</li> <li>- Protocol registry updated;</li> <li>- "Inbox" updated</li> </ul>
<p><b>Shipping and archiving outgoing documents</b></p> <p><b>Incoming information:</b></p> <ul style="list-style-type: none"> <li>- mail processed by the PE offices;</li> <li>- requests for editing and emailing from internal staff.</li> </ul> <p><b>Operational tasks:</b></p> <ul style="list-style-type: none"> <li>- connect to the email service to send email and check the recipient's address;</li> <li>- write down the details in the Protocol registry by assigning a registration number and indicating your initials;</li> <li>- type the message indicating the registration number and your initials and send it with any documents (files) attached;</li> </ul> <p><b>Results:</b></p> <ul style="list-style-type: none"> <li>- Email sent;</li> <li>- Protocol Registry updated;</li> <li>- "Outbox" updated.</li> </ul>	<p><b>Protocol registry management</b></p> <p>Guidelines for maintenance of the Protocol registry. In the registry, you must specify:</p> <ul style="list-style-type: none"> <li>• the number assigned to the document;</li> <li>• the date of shipment;</li> <li>• the date of the document;</li> <li>• full details of the recipient;</li> <li>• the document object: in the case of order, order confirmation, delivery note, invoice must indicate type, number and date of the document;</li> <li>• for mail in a foreign language indicate which language it is</li> </ul>

### 3.3.7. Treasury office

<b>Suppliers schedule management</b> <b>Incoming information:</b> - copy of the purchase invoice received <b>Operational tasks:</b> - update the Suppliers schedule; - put the stamp "RECEIVED ON ..." and your initials on the copy of the invoice, indicating also the date of the transaction; - check out the daily schedule and eventually make the payment (see below); - transmit daily, after updating operations, a copy of the timetable to book-keeping office." <b>Results:</b> - Suppliers schedule updated; - "Purchase invoices" updated.	<b>Payments management</b> <b>Incoming information:</b> - Suppliers schedule; - "Purchase invoices"; - request for payment of payroll. <b>Operational tasks:</b> - setup the transfer order to be sent to the bank; - stamp the document and present it to the Director for signature; - put the stamp "PAID" next to the date and your initials on the copy of the invoice; - transfer the copy of the invoice and relevant documents from the "Purchase invoices" to the Bank <b>Results:</b> - Bank Book updated and sent to book-keeping; - "Bills of purchase" updated
<b>Management of missed payments</b> <b>Incoming information:</b> - supplier reminder - Suppliers schedule <b>Operational tasks:</b> - check out the actual non-payment of the invoice in question; - control the payment mode proposed - make payment in the manner prescribed - store copy of the request and payment in the Cash Book or Bank Book, transferred from "Purchase invoices." <b>Results:</b> - payment made - "Purchase invoices" updated; - Book Bank updated and sent to book-keeping	<b>Revenue management</b> <b>Incoming information:</b> - "Bills of sale" folder; - Customers Schedule; <b>Operational tasks:</b> - record the transaction on the Bank Book by putting your initials; - check the actual recording in c / c internet banking consulting the address of the practice firm; - update the Customers schedule; <b>Results:</b> - Customers Schedule updated; - "Bills of Sale" file updated;
<b>Revenue loss management</b> <b>Incoming information:</b> - Customers Schedule; <b>Operational tasks:</b> - 10 days after the deadline issue the requests for payment; - setup reminder letter indicating the registration number and send it - transmit the original S for shipment. <b>Results:</b> - payment reminder sent; - "Bills of Sale" file updated;	<b>Customers schedule management</b> <b>Incoming information:</b> - copy of the sales invoice received from sales office. <b>Operational tasks:</b> - updating the Customers Schedule; - indicate on the invoice date of the transaction with the stamp "RECEIVED THE ..." and your initials; - store the invoice in the file "bills of sale"; - check out the daily schedule and possibly measures to urge the payment (see below); <b>Results:</b> - Customers Schedule updated; - File "Bills of sale" updated.

### 3.3.8. Warehouse office

<b>Inventory Management</b> <b>Incoming information:</b> - warehouse card. <b>Operational tasks:</b> - check out all products in stock by analyzing the warehouse cards; - fill in the "Printout stock"; - transmit the "printout stock" to sales office - if certain items have reached the limit of minimum stock fill in the form "List of products to order"; - transmit the "List of products to order" to purchase office <b>Results:</b> - "Printout stock" transmitted to sales - "List Product to Order" sent to purchase	<b>Loading of products in stock</b> <b>Incoming information:</b> - purchase Delivery note; - purchase Invoice. <b>Operational tasks:</b> loading from Delivery note - load items on the "Storage Card", handling for each of them the quantity purchased; - fill in the date and your initials on the copy of Delivery note; - store the copy of Delivery note in the file "Incoming goods Documents." <b>Results:</b> - Inventory Cards updated; - "Incoming goods Documents" file updated
<b>Unloading the products from the warehouse</b> <b>Incoming information:</b> - issued delivery note. <b>Operational tasks:</b> - unload products on the "Storage Card", handling for each of them the quantity sold; - fill in the date and your initials on the copy of delivery note; - store the copy of delivery note in the file "Outgoing goods Documents" <b>Results:</b> - Inventory Cards updated; - "Outgoing goods Documents" file updated	<b>1. Sales analysis</b> <b>Incoming information:</b> - warehouse cards updated. <b>Operational tasks:</b> - analyze sales trends for each product, recorded monthly, building an appropriate graphic to see the actual situation; - print the data processed in 2 copies; - transmit a copy of the data processed in MK for a correct recognition of promotions to be implemented; - store the copy in the file "Warehouse activities" in the section "Sales chart." <b>Results:</b> - trend sales graph sent to MK; - "Warehouse activities" file updated.
<b>Safety on the working place</b> <b>Incoming information:</b> - material from internet <b>Operational tasks:</b> - research on the Internet, using appropriate techniques, materials relating to the law; - redact documents to be posted on the notice board, bearing distinctly standards closely related to the obligations of the employer and employees; - organize and manage an internal training course for employees, concerning safety at the workplace; - provide a "Evacuation Plan" of the practice firm, in case of fire or similar emergency situations, according to the rules sought on the Internet; <b>Results:</b> - the note on the notice board of documents bearing the obligations of the employer and employees; - internal training course for employees; - "Evacuation Plan";	

**Keywords for INTO ACTION:**

Job description	Task list
Offices	Working places rotation
Duties	Responsibilities
Team working	Problem solving
Cooperation	Market
Accounting	Human resources
Marketing	Purchasing
Sales	Front office
Sales analysis	Warehouse
Treasury	Payment
Inventory	Quality
Suppliers	Customers
Registries	Transaction
Discounts	Archiving
Confidential information	Budget
Stock	Assortment
Questionnaire	Recruitment
Management	Process

**Self – check questions:**

- ✓ Do these tools have helped you in developing the tasks?
- ✓ Have you had difficulties in passing from one job place to another one? Can you explain?
- ✓ Are you satisfied with the office organization?
- ✓ How is your personal attitude concerning the relationship with the group?
- ✓ Have you checked your work quality before sending it out?
- ✓ Do you understand the processes in different departments /offices?



## 4. COMPETENCIES ASSESSMENT

Working in the PE challenges you to think beyond boundaries of the classroom, helping you develop the skills, behavior and confidence necessary for success in the 21st-century. The Practice Enterprise offers a learning environment that helps you ask questions, analyze, evaluate, make plans, conclusions, and ideas leading you to improved competencies.

Assessment in the PE evaluates your knowledge about Practice Enterprise as well as entrepreneurship competencies like creativity, collaboration, problem-solving, innovation and others.

### Recommendations:

- ✓ You can evaluate yourselves in 3 competencies areas: Ideas and opportunities; Resources and Into Action. Ask the PE teacher for the **self -evaluation tables** and color or underline the statements which are true about you or which you agree with. It does not matter how many statements you can color at this point in time. All the statements are given to show you what possibilities you will have while working in a PE.
- ✓ **Ideas and opportunities** stage competences include spotting opportunities, creativity, vision valuing ideas, ethical and sustainable thinking.
- ✓ **Resources** stage competences include: self-awareness and self-efficacy, motivation and perseverance. Financial and economic literacy, mobilizing resources and mobilizing others.
- ✓ **Into Action** stage competences self-evaluation include taking the initiative, planning and management.
- ✓ You can use the Self-assessment tool **when rotating** (changing the department). For feedback collection you can create templates with the questions and use it each time you change the department.
- ✓ After you participate in the Practice Enterprise activities, change a position several times it is expected that your **knowledge and technical skills** have improved. Here you and your teacher can evaluate your skills in certain thematic areas of the Practice Enterprise. If there are some areas where you find your skills good or excellent it means that you did great. If there are several thematic areas where you haven't improved so far, possibly you would like to practice next year, with the same or other team.
- ✓ Ask the PE teacher for self -evaluation tables to evaluate your knowledge and technical skills.



Example for feedback collection each time you change the department

Statement	Totally agree	Agree	Neither Agree nor Disagree	Dissagree	Totally disagree
I do my job without support from the teacher					
I do not need reminding about my responsibilities					
I contribute to teamwork					
I perform my job with accuracy					
I respect the rules					
I get along with other members of the PE					
I am flexible to change					

If you want to discover more about entrepreneur competencies, follow these links:

Three Competencies Every Entrepreneur Should Develop

<https://www.ideasforleaders.com/ideas/three-competencies-every-entrepreneur-should-develop>

European Entrepreneurship Competence Framework

<https://www.youtube.com/watch?v=UwZPcJky0Ko>