

HUBBARD COMMUNICATIONS OFFICE  
Saint Hill Manor, East Grinstead, Sussex

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Remimeo  
Dept 7  
Registrars  
Divs 2 & 6  
Qual I&I  
Bookstore

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INVOICES, HOW TO WRITE.)

INVOICES, HOW TO WRITE

The importance of correct invoices containing all details of the transaction cannot be over-emphasized. Invoices circulate throughout the org to provide vital information to all terminals concerned. They are used to admit persons for service and to keep a record of their account with the org. They provide a gold mine of information from which org income sources can be surveyed and reinforced and any cutative prices can be detected. They are the main running time track of an org's dealings with the public.

AN ORG WHICH TOLERATES SLOPPY INVOICE WRITING IS INTRODUCING ABERRATION INTO ITS OWN TIME TRACK, through omitted data, dropped out time and even falsehoods. And such aberration will never fail to recoil on the org, cutting down its public reach and bringing about lost income.

WHAT GOES ON AN INVOICE

Following is a summary of the types of data that must appear on an invoice and also shows why each type of information is required.

1. Date, to record the time of the transaction.
2. Name, address and phone number of the customer, in full and in block letters. Invoices are used by various departments to contact and call-in persons on org lines and they are used to provide a record of persons who come into the org for the first time and whose name and address might otherwise not be recorded.
3. Full description of item or service being invoiced, including its full price, with any discounts or additional taxes computed and shown directly on the invoice and full details of the transaction. If it is a package sale add to the invoice the name of the package, the price of the package and then a complete breakdown of all the services which make up this package with their individual dollar (or other currency) amounts listed next to them. This is determined by figuring out how much each of the services included in the package would be at full price, totalling them, and then determining what percent of the whole amount each service is. These same percents are then used in relation to the package price to determine how much each service is worth at the package value.

EXAMPLE:

NED/NED GRAD/NED INTERNESHIP SCHOLARSHIP: Full  
Price Breakdown

FULL PRICE = \$5,600.00

NED Course	2,800.00 (full price)	= 50% of whole
NED Grad Course	1,000.00	= 18%
NED Internship	<u>1,800.00</u>	= 32%
	\$5,600.00 (full price)	100%

Therefore, in relation to the Package Price the NED Course is in this example 50% and therefore equals \$1,260.00. These are therefore listed on the invoice as follows:

Package Price Breakdown:

PACKAGE PRICE	\$2,520.00
NED Course	1,260.00
NED Grad Course	453.60
NED Internship	<u>806.40</u>
	\$2,520.00 = Package Price

By giving this full description of the item or service being invoiced it can be shown that prices are correct with no off-policy discounts or other cutative prices. Taxes can be computed and accounted for to Government authorities. Invoice surveys can be done easily to determine income sources. And the customer who receives his copy has all the information regarding what he paid for and how much it cost him.

4. A clear statement of the amount actually received as cash, credit or debit to the person's account, in the lower right hand corner of the invoice, in the appropriate space marked CREDIT, DEBIT or CASH. This facilitates Treasury's job as they can flick through the invoices to add them up and clearly see the amount that needs to be posted on the person's statement.

5. A clear statement on the invoice that the A/P (Advance Payment) is for Bookstore items when this is the case so that these A/Ps can be easily distinguished from Advanced Payments for services. In addition, when money is being debited for Bookstore items from A/Ps originally intended for services, this must also be clearly indicated in the invoice. This data is essential in correctly calculating the amount to be transferred to the Book Account at the end of the week.

6. A full statement of the method of payment. If cheque, give bank name and cheque number. If transfer or bank wire, state so and give details. In this way payment can be checked and verified and invoices can be matched easily against actual receipts.

7. Whether service is now fully paid or partly paid, and if in latter case, balance due on service. This is valuable data for the Call-In Unit who uses invoice copies for call-in functions.

8. Signature of person making out the invoice, so that any questions arising can be answered.

9. Whether Training, Processing, Bookstore or Qual items, shown by the appropriate large letter T, P, B or Q on the invoice. This facilitates routing of copies to department concerned and income breakdowns.

10. Customer signature on all debit invoices, so that the org has a record of the person acknowledging the debit.

11. Any other details not specifically listed above but found necessary so that a full record of the transaction exists.

DOs AND DON'Ts

1. ALWAYS PUT ALL THE INFORMATION ABOUT THE TRANSACTION ON THE INVOICE. Leave nothing up to memory or additional notes or memos.

2. ALWAYS USE VERY LEGIBLE HANDWRITING THAT ANY ORG TERMINAL CAN DECIPHER, now or years from now. Use good carbon to make all copies clearly legible. Print the name, address and phone number of the customer in block letters.

3. ALWAYS WRITE ONE INVOICE FOR EACH TRANSACTION AND NEVER MORE THAN ONE TRANSACTION ON EACH INVOICE.

EXAMPLE: If a person pays for five intensives all at once and starts the first one now, he gets (a) one invoice for first intensive as a cash sale and (b) one invoice for four intensives on account as a prepayment.

EXAMPLE: If a person pays for one intensive at \$625, but gives a cheque for \$650, and instructs that the balance be credited to his account for future book purchase, he gets (a) one invoice for the intensive and (b) one invoice as a \$25 credit to his account.

EXAMPLE: If a person has made an A/P for an Academy Package, he gets one PPU (Pre-Payments Used) debit invoice every time he starts a new level, for the pro-rated value of that level.

4. NEVER WRITE AN "OUT OF PRE-PAYMENTS" INVOICE WITHOUT FIRST VERIFYING THAT THE PRE-PAYMENT IS THERE IN THE ACCOUNT IN THE FIRST PLACE. Do not take the customer's or someone else's verbal data and do not go by your own familiarity with the account. Someone else might have written debit invoices on that account since you last checked the balance. So if it isn't written it isn't true. Always check the account folder first. (Registrars do not have to leave the customer and go dig out the folder in Treasury. They call the Cashier and the Cashier brings the folder right into the Reg's Office. Dept 7 provides this service.)

5. NEVER WRITE AN "OUT OF PRE-PAYMENT" INVOICE WITHOUT HAVING TO HAND THE SPECIFIC AUTHORIZATION OF THE ACCOUNT HOLDER TO DO SO. If he is there in person make him sign the invoice. If he is not there, obtain his written authorization (not someone else's word) to debit his account, and file a copy of such in the accounts folder.

6. NEVER INVOICE MONEY UNLESS YOU HAVE IT. ALWAYS INVOICE ALL MONIES RECEIVED FROM WHATEVER SOURCE.

7. ALWAYS STATE ON THE INVOICE WHAT SERVICE OR ITEM THE MONEY IS BEING RECEIVED FOR. Never write only "In PP". We are not a bank. We do not have deposits and withdrawals. Our customers pay for specific services and then take them.

8. ALWAYS CHECK WITH THE DIR INCOME OR CASHIER BEFORE ISSUING AN INVOICE ADMITTING A PERSON TO SERVICE ON CREDIT. Only Dept 7 is authorized to grant credit arrangements, based on policy and on the person's past credit record with the org.

9. ALWAYS ACCOMPANY A DEBIT INVOICE ADMITTING A PERSON TO SERVICE ON CREDIT OR A STAFF MEMBER AT NO CHARGE WITH A SEPARATE PROMISSORY NOTE. Just having the person sign the debit invoice isn't enough.

10. ALWAYS TREAT INVOICES AS THE VERY VALUABLE RECORD THAT THEY ARE. Don't lose them or misuse them or misfile them or render them useless through illegibility.

#### POLICING INVOICE WRITING

The Dir of Income is overall responsible for issuing invoices to all invoicing stations (Registrars Div 2 and Div 6, Bookstore Officer, Qual I&I, Cashier) and for policing accuracy of invoice writing. He inspects all invoices written daily and corrects any flubs by instant hating the terminal responsible and getting across the reality on the importance of correct invoice writing, using the correct gradient approach to bring about improvement of the scene. If he has any recurring difficulties getting the line in, he can call upon the FBO to back him up or request assistance from Admin Cramming. If illegible invoices are the trouble, Cramming can put the staff member through simple writing drills that will improve legibility of handwriting. If misunderstands or disagreements are present, Cramming can handle with word clearing, checkouts and drills.

#### SPEED OF SERVICE

Needless to say, do not stop the flow of money or keep the customer waiting forever while taking great time to write meticulously perfect invoices. Speed is of paramount importance. It will be soon acquired if you learn the points of this PL cold and drill them. And if Dept 7 provides spot-on demand with no wait for every person in their files.

THE BOARDS OF DIRECTORS  
of the  
CHURCHES OF SCIENTOLOGY

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