



**Task Title: Write a Work Order/Invoice**

OALCF Cover Sheet – Learner Copy

**Learner Name:** \_\_\_\_\_

**Date Started:** \_\_\_\_\_

**Date Completed:** \_\_\_\_\_

**Successful Completion:** Yes  No

**Goal Path:** Employment  Apprenticeship

Secondary School  Post Secondary  Independence

**Task Description:** The learner will use information provided during role play to complete a work order/invoice.

**Main Competency / Task Group / Level Indicator:**

- Find and Use Information/Read continuous text/A1.2
- Communicate Ideas and Information/Interact with others/B1.1
- Communicate Ideas and Information/Complete and create documents/B3.2
- Understand and Use Numbers/Manage money/C1.2
- Manage Learning/E.1

**Performance Descriptors:** See chart on last page

**Materials Required:**

- Pencil or Pen
- Calculator

## Learner Information

Working with bills and invoices is one of the tasks you will face when you reach your goal of getting a job in the sales and service industry. This task will give you an opportunity to use several skills together and to see how they are used for preparing a bill for a customer.

## Learner Instructions

In this activity, you will play the part of a clerk in the customer service department of the Bradford Glass Company. Your instructor will be a customer coming to Bradford Glass to get some help. Your job is to prepare a work order / invoice for the job. Here is a list of things that will help you as you work through this demonstration.

1. Ask questions of the customer to get the information you need.
2. You may ask your customer for the spelling of any proper names that you are not sure of.
3. You may take rough notes during or after the conversation with your customer.
4. You will need to be familiar with the company price list in order to answer questions the customer will ask.
5. Use the form provided to write up the work order/invoice.
6. When you have completed writing up the invoice, go over the invoice with your customer so that they understand the charges.

<b>BRADFORD GLASS LTD.</b> Box 1233 Bradford, Ontario, L9Z 2B7 (905) 775- 0000					<b>WORK ORDER / INVOICE</b>  Number: 0217			
<b>Customer Order #</b>		<b>Telephone</b>			<b>Fax</b>		<b>Date</b>	
<b>Name:</b>								
<b>Address:</b>								
<b>Postal Code</b>								
<b>Sold By</b>	<b>Cash</b>	<b>Charge Card</b>	<b>Cheque</b>	<b>Debit</b>	<b>C.O.D.</b>	<b>On Acct</b>	<b>Mdse ret</b>	<b>Paid out</b>
<b>Quantity</b>		<b>Description</b>				<b>Price</b>		<b>Amount</b>
<b>Special instructions</b>       <b>All claims and returned goods must be accompanied by a paid bill</b>						<b>Subtotal</b>		
						<b>HST</b>		
						<b>TOTAL</b>		
<b>Received by:</b>						<b>Thank You</b>		

**BRADFORD GLASS LTD. Box 1233 Bradford, Ontario, L9Z 2B7**

**Price List – Window and Mirror Repairs**

**Labour costs: \$28.00/Hour**

<b>Parts</b>	<b>Size</b>	<b>Cost of Materials</b>	<b>Time Required (hours)</b>
Glass sheets	8”X10”	\$4.60	1
	10”X14”	\$5.80	1
	18”X 24”	\$8.75	1.5
	24”x36”	\$15.95	2
	4’X8”	\$35.00	2
	8’x12’	\$45.00	3
Mirror sheets	8”X10”	\$6.80	1
	10”X14”	\$10.20	1
	18”X 24”	\$28.00	1.5
	24”x36”	\$48.00	2
	4’X8”	\$60.00	2
Wire and findings		\$5.60	

Learner's self reflection:

I listened carefully to what my customer wanted. Yes No

I took notes during the conversation. Yes  No

I asked for all the details I needed. Yes  No

I was able to answer any questions the customer asked. Yes  No

I could re-read my notes after the conversation. Yes  No

I was able to make up an invoice with all the relevant details. Yes No

The invoice was clear and neatly written. Yes No

Other comments: