



Task Title: Write a Work Order/Invoice

OALCF Cover Sheet – Learner Copy

Learner Name: _____

Date Started (m/d/yyyy): _____

Date Completed (m/d/yyyy): _____

Task Description: Using role play the learner will complete the work order/invoice, using the information provided (by the practitioner in the role of customer).

Competency: A: Find and Use Information
B: Communicate Ideas and Information
C: Understand and Use Numbers
E: Manage Learning

Task Groups: A2: Interpret documents
B1: Interact with others
B3: Complete and create documents
C1: Manage money

Level Indicators:

- A2.2: Interpret simple documents to locate and connect information
- B1.1: Participate in brief interactions to exchange information with one other person
- B3.2: Use layout to determine where to make entries in simple documents
- C1.2: Make low-level inferences to calculate costs and expenses that may include rates such as taxes and discounts

Materials Required:

- Practitioner and Learner instructions
- Sample work order/invoice
- Sample price list
- Pencil
- Skill-building activities include: multiplication of decimals, calculating percentages, addition of multiple digit numbers; understanding the parts of an invoice/work order; extracting necessary information from a customer to complete a work order (i.e. telephone messages)

Learner Information and Tasks

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.

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.

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

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

Price List – Window and Mirror Repairs

Labour costs: \$28.00/Hour

Parts	Size	Cost of Materials	Time Required (hours)
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: