

Task Title: Write a Work Order/Invoice

# OALCF Cover Sheet – Practitioner Copy



**Learner Name:**

**Date Started (m/d/yyyy):**

**Date Completed (m/d/yyyy):**

**Successful Completion:**  Yes No 

|  |  |  |
| --- | --- | --- |
| **Goal Path:** | Employment | Apprenticeship |
| Secondary School | Post Secondary | Independence |

**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

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

**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)

**Practitioner Instructions:**

1. Make sure the learner understands the information and instructions for this task.
2. Go over the performance descriptors section with your learner to ensure that the learner understands what skills, knowledge or behaviours are being assessed by this task.
3. Discuss with the learner and decide what would be a reasonable length of time for the completion of this task. Record this on the assessment form.
4. When the learner has completed the task, provide a way for the learner to self-reflect on the experience. Complete the assessment form with the learner, enter the date completed, and note whether it was successful or needs to be tried again.
5. Make any adjustments to size of font or amount of text on a page that you feel is appropriate for this level and this learner.

**Practitioner Information:**

In this role-play situation, you, the practitioner, are a customer who comes into the learner’s place of business to ask for a repair. This is the information you will need.

• You have a mirror that is broken, and the glass needs to be replaced.

• You need this as quickly as possible.

• You want to know how much it will cost.

Give the following information when and if prompted:

• Your name is Philippa Madison

• Your address is 56 Willowdale Road, Tottenham, Ontario, L0G 1W0

• Your phone number is 936-3355 (area code 905). You have an   
 answering machine at home.

• The size of the mirror frame is 20 inches by 28 inches.

• You plan to pay with Visa

**Help Allowed:**

* The student may ask questions to clarify information.
* The student may ask for the spelling of proper names.
* The student may take notes while you are talking and use them to calculate costs and write up the invoice.

**Adaptation:**

Conduct the initial contact with the student over the telephone. Make up a different scenario, with different materials/ products, and an appropriate invoice /bill form.

# 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.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **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** | | | | | | | | | | |
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| **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” X 10” | $4.60 | 1 |
|  | 10” X 14” | $5.80 | 1 |
|  | 18” X 24” | $8.75 | 1.5 |
|  | 24” X 36” | $15.95 | 2 |
|  | 4’ X 8’ | $35.00 | 2 |
|  | 8’ X 12’ | $45.00 | 3 |
| Mirror sheets | 8” X 10” | $6.80 | 1 |
|  | 10” X 14” | $10.20 | 1 |
|  | 18” X 24” | $28.00 | 1.5 |
|  | 24” X 36” | $48.00 | 2 |
|  | 4’ X 8’ | $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 Yes  No 

details.

The invoice was clear and neatly written. Yes  No 

Other comments:

# Answer Key

\*There may be some variation, depending on the questions that the learner asked

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| BRADFORD GLASS LTD.  Box 1233  Bradford, Ontario, L9Z 2B7  (905) 775- 0000 | | | | | WORK ORDER / INVOICE  Number: 0217 | | | | | |
| Customer Order # | | Telephone  **905-936-3355** | | | | Fax | | Date  **(today’s date)** | | |
| Name: **Philippa Madison** | | | | | | | | | | |
|  | | | | | | | | | | |
| Address: **56 Willowdale Road, Tottenham, ON** | | | | | | | | | | |
| Postal Code **L0G 1W0** | | | | | | | | | | |
| Sold By | Cash | **Charge**  **Card (Visa)** | Cheque | Debit | | C.O.D. | On Acct | Mdse ret | | Paid out |
| Quantity Description Price Amount | | | | | | | | | | |
| **1** | **Mirror Sheet – 24”x 36”** | | | | | | **48.00** | | **48.00** | |
| **2** | **Labour – cut to 20”x28” and install** | | | | | | **28.00** | | **56.00** | |
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| Special instructions  **Needs done ASAP**  **Messages can be left on answering machine**  All claims and returned goods must be accompanied by a paid bill | | | | | | | Subtotal | | **104.00** | |
|  | |  | |
| HST | | **13.52** | |
| TOTAL | | **117.52** | |
| Received by: Thank You | | | | | | | | | | |

# Performance Descriptors

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Levels | Performance Descriptors | Needs Work | Completes task with support from practitioner | Completes task independently |
| A2.2 | Extracts information from tables and forms |  |  |  |
|  | Uses layout to locate information |  |  |  |
|  | Makes connections between parts of documents |  |  |  |
|  | Makes low-level inferences |  |  |  |
| B1.1 | Chooses appropriate language in exchanges with clearly defined purposes |  |  |  |
|  | Participates in short, simple exchanges |  |  |  |
|  | Gives short, straightforward instructions or directions |  |  |  |
| B3.2 | Uses layout to determine where to make entries |  |  |  |
|  | Begins to make some inferences to decide what information is needed, where and how to enter the information |  |  |  |
|  | Makes entries using a limited range of vocabulary |  |  |  |
|  | Follows instructions on documents |  |  |  |
| C1.2 | Calculates using numbers expressed as whole numbers, fractions, decimals, percentages and integers |  |  |  |
| C1.2 | Calculates percentages |  |  |  |
|  | Interprets and applies rates |  |  |  |
|  | Chooses and performs required operation(s); may make inferences to identify required operation(s) |  |  |  |
|  | Selects appropriate steps to reach solutions |  |  |  |
|  | Represents costs and rates using monetary symbols, decimals and percentages |  |  |  |
|  | Interprets, represents and converts amounts using whole numbers, decimals, percentages, ratios and simple, common fractions (e.g. ½, ¼ ) |  |  |  |
|  | Uses strategies to check accuracy (e.g. estimating, using a calculator, repeating a calculation, using the reverse operation) |  |  |  |
| E.1 | Begins to monitor own learning |  |  |  |

This task:

Was successfully completed Needs to be tried again 

Learner Comments:

Instructor (print):

