

Task Title: Automotive Invoice for Service

# OALCF Cover Sheet – Practitioner Copy

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

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

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

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

**Successful Completion:**  Yes No

**Task Description:** Create and complete an invoice for work in an automotive shop.

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

* Communicate Ideas and Information/Complete and create documents/B3.3a and B3.3b
* Understand and Use Numbers/Manage money/ C1.2
* Use Digital Technology/D.3

**Materials Required:**

* Pen/pencil and paper
* Computer with word processing or spreadsheet processing program
* Calculator or digital device with calculator function

# Learner Information

In service industries, many people are self-employed and responsible for creating the documents used in their businesses. Automotive Service Technicians need to be able to create invoices, purchase orders and a variety of forms relevant to the automotive sector.

# Work Sheet

**Task 1: Create a company invoice using an invoice template in Microsoft Word, Excel, Google Docs or Google Sheets. Format the invoice to be printable on one page. The invoice template will include the following headings:**

* **Company Information: Address: ABC Automotive, 123 Main Street. Muskoka, ON K0K 0K0. Phone: 705-555-4444**
* **Invoice number**
* **Dates: Car serviced and completed**
* **Type of vehicle**
* **VIN#**
* **Customer name, address and phone number**
* **Part description and number**
* **Quantity**
* **Price/unit**
* **Labour description**
* **Estimate**
* **Total labour**
* **Total parts**
* **Subtotal**
* **Tax**
* **Total due**
* **Odometer reading**

Answer: No written response required here.

Task completed: Yes:

**Task 2: Using the invoice you just created, complete it with the following service requested by the customer. Use the formulas in Excel for the calculations, calculate manually in Word, or use a calculator.**

* **Invoice # 95847**
* **Serviced date (May 5 2024), service completed date (May 6 2024)**
* **Customer: John Hamilton, 705-555-5555**
* **Vehicle: 2006 Murano, 3.5 L, V6**
* **Odometer: 152,685 km**
* **Service Tech: Your name**
* **1 Oil Filter, $5.95, Part # 8954**
* **5 Synthetic Motor Oil, $10.95 each, Part # 8950**
* **Emission Test, $35, Test Result Pass, Code # 2323**
* **13% HST**
* **Total Labour Cost - $80**

Answer: No written response required here.

Task completed: Yes:

# Answers

The complete invoice (filled in template) should look similar to this:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Invoice | | | | |  | | Date: (Today’s Date)  Invoice # 95847 | | | | |
| ABC Automotive  123 Main Street  Muskoka, ON K0K 0K0  705-555-4444  Service Technician: (Learner’s Name) | | |  | o | | | | |  | **Customer**  John Hamilton  705-555-5555 | |
| ***Date Car Serviced*** | ***Type of Vehicle*** | | | | | ***VIN#*** | | ***Odometer Reading*** | | ***Date Car completed*** | |
| May 5, 2024 | 2006 Murano, 3.5L, V6 | | | | |  | | 152,685 km | | May 6, 2024 | |
|  | |  | | | | | | | | | |
| ***Part/Code #*** | ***Part Description*** | | | | | ***Quantity*** | | ***Price/Unit*** | | ***Labour Description*** | ***Totals*** |
| 8954 | Oil Filter | | | | | 1 | | 5.95 | | Replace Oil Filter | 5.95 |
|  |  | | | | |  | |  | |  |  |
| 8950 | Synthetic Motor Oil | | | | | 5 | | 10.95 | | Replace Oil | 54.75 |
|  |  | | | | |  | |  | |  |  |
| 2323 | Emission Test | | | | | 1 | | 35.00 | | Passed | 35.00 |
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|  | | | | | | | | ***Total Labour*** | | 80.00 | |
|  | | | | | | | | ***Total Parts*** | | 95.70 | |
|  | | | | | | | | ***Subtotal*** | | 175.70 | |
|  | | | | | | | | ***Tax (13% HST)*** | | 22.84 | |
|  | | | | | | | | ***Total Due*** | | $198.54 | |
|  |  | | | |  | | Make all cheques payable to ABC Automotive  ***Thank you for your business!*** | | | | |

# Performance Descriptors

| Levels | Performance Descriptors | Needs Work | Completes task with support from practitioner | Completes task independently |
| --- | --- | --- | --- | --- |
| B3.3a | uses layout to determine where to make entries |  |  |  |
|  | makes inferences to decide what, where and how to enter information |  |  |  |
| B3.3b | follows conventions to display information in more complex documents (e.g. use of abbreviations, symbols) |  |  |  |
|  | sorts entries into categories and subcategories |  |  |  |
|  | displays many categories of information |  |  |  |
|  | organizes information in a variety of ways |  |  |  |
|  | identifies parts of documents using titles, row and column headings, sub-headings and labels |  |  |  |
| C1.2 | calculates using numbers expressed as whole numbers, fractions, decimals, percentages and integers |  |  |  |
|  | 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) |  |  |  |
| D.3 | experiments and problem-solves to achieve the desired results |  |  |  |
|  | manages unfamiliar elements (e.g. vocabulary, context, topic) to complete tasks |  |  |  |
|  | makes inferences to interpret icons and text |  |  |  |
|  | selects appropriate software when required by the task |  |  |  |
|  | identifies sources, evaluates and integrates information |  |  |  |

This task: Was successfully completed Needs to be tried again

Learner Comments:

Instructor (print): Learner (print):

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