

Learners can accurately give, store, and submit invoices

Learners can visit job site to accurately scope with a standardized process

Learners can survey the job requirements to determine cost

- Measure square/linear foot of the area of job site
- Determine materials based on project
- Review plans/instruction drawings
- Survey area to ensure there is not any obstructions
- Speak with client to ensure both ideas are parallel

Learners can format invoice using Microsoft Excel

- Learners can use Excel to create invoice
- Learners can create their own individual style guide and template
- Create a template that follows a standard that is easy to read and understand across all company/individual invoices
- Identify readability best practices (bold fonts, resize, etc.) for enhancing invoice
- Learners remember to use correct excel template
- Locate correct template within Excel
- Learners can categorize resources and client information
- Remember to save project by Clientname_date
- Create a hierarchical folder for project organization
- Remember to categorize similarly scoped projects in corresponding folders for future reference
- Learners can form repositories from completed projects for reference, such as time of completion and material pricing
- Build company invoice repository
- Collect references from all recently completed projects
- Establish company specific data storage practices

Learners can analyze LOM and previous projects to create invoice

- Learners can use list of materials (LOM) to accurately price invoice materials
- Locate correct materials on the LOM
- Learners can analyze previously completed projects of similar scope to determine an accurate *real cost of labor* (RCL) and estimated project length
- Estimate labor hours needed based on projects grouped in same hierarchical folder

Learners can review and submit invoice content

- Learners can review the LOM and similar projects to ensure accuracy and comfort of pricing and income
- Remember techniques for an effective invoice
- Determine if the scope of the project and the pricing are parallel