**Overview**

This standard is for experienced estimators who produce quotations for print orders and data for invoicing. They should also be aware of the need to review and compare costs of work produced prior to invoicing.

The standard has three elements:

1. Produce a quotation using an approved estimating procedure on a Management Information System
2. Review and Revise Production Costs.
3. Produce data for invoicing

Before a customer places an order for services or products, it is usual for an estimate to be prepared that may subsequently form the basis of any contract. It is vitally important that the estimate is accurate, includes all the production processes, materials and any other costs that will be incurred.

The task of estimating, although requiring a great depth and range of knowledge, comes down to a few key tasks: knowing the costs of materials and calculating accurately the quantity required for a job; knowing the cost of labour/processing; and identifying and determining the costs of all other activities that will be required to be undertaken in order to deliver the finished work to the customer. This is normally done electronically using a Management Information System (MIS).

The preparation of data for invoicing can involve the reviewing of the production cycle for a particular job. Extra costs may have occurred in the production of the job. This information should be monitored and updated, as the work passes from department to department, via the data collection system. However, it has to be checked.  Whether it is last minute changes to files, change of substrate or anything else that has been added to the original specification, the extra production costs have to be paid for. It is therefore incumbent on the learner to review the costs, and if necessary adjust the data for the invoice to suit.

| Performance criteria | **Produce a quotation using an approved estimating procedure on a Management Information System** | |
|---|---|---|
| You must be able to: | P1 | assess the job requirements |
| | P2 | communicate with and clarify customers' requirements |
| | P3 | use your company's estimating system |
| | P4 | obtain customer prices for the product and quantity requested, plus potential different quantities and any run-on quantities |
| | P5 | include the following on your estimate: |
| | | P5.1 material costs |
| | | P5.2 labour and/or machinery costs |
| | | P5.3 outwork costs, if applicable |
| | | P5.4 delivery costs, if applicable |
| | | P5.5 ancillary costs, if applicable |
| | P6 | analyse the quotation and provide calculations for added value, contribution and cost rates |
| | P7 | deal effectively with queries including alternative materials, methods of production and differing finishing or image enhancement techniques/processes |
| | P8 | provide the quotation to the customer in the format required by the customer and/or your company |

**Review and revise production costs**

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|---|---|---|
| You must be able to: | P9 | collect or obtain production cost information, including: |
| | | P9.1 outwork costs |
| | | P9.2 production costs |
| | | P9.3 material purchases and stock usage |
| | | P9.4 possible exceptional items |
| | | P9.5 carriage costs |
| | P10 | compare production cost information with the original quotation |
| | P11 | identify any additional costs incurred |
| | P12 | investigate differences between estimated and actual costs |
| | P13 | report extra costs to a senior colleague and action their decision |
| | P14 | confirm extra costs to customer in line with contractual agreement |

**Produce data for invoicing**

You must be able to:
P15 produce data for invoicing that is accurate and complete

P16 include where applicable:

    P16.1 description of the work done

    P16.2 correct charges including additional work

    P16.3 customers purchase order reference

    P16.4 value added tax, if appropriate

P17 save all job details on management information system

## Knowledge and understanding

You need to know and understand:

K1    confidentiality

K2    copyright

K3    how to communicate with internal and external customers

K4    the workplace policies at your company

K5    the safe handling of customer material

K6    how to archive digital files/materials

K7    selection of process

K8    the production stages

K9    the materials and consumables

K10   the use of management information systems

K11   data collection

K12   the factors relevant to mark up and margin

K13   tender estimating

K14   e-auctions

K15   environmental issues

K16   carbon offset

**Additional information**

**Scope / range:**      This standard is for the role of an experienced estimator. Learners will essentially be dealing with, what would be referred to as average to complex estimates/quotations.

Learners are required to review production costs, essentially for additional costs incurred, but are also required to review estimated to actual production costs prior to producing an invoice.

When producing data for invoicing, great care has to be taken to include all necessary information including correct costings.

# PROPA03
# Produce print estimates and data for invoicing

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| **Originating organisation** | Proskills |
| **Original URN** | PROPA03 |
| **Relevant occupations** | Originators compositors and print preps; Printers; Screen printers; Printing machine minders and assistants; Bookbinders and print finishers; Graphic designers |
| **Suite** | Print Administration |
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