

## Produce print estimates and data for invoicing

**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.

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.

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## Performance criteria

*You must be able to:*

### **Produce a quotation using an approved estimating procedure on a Management Information System**

1. assess job requirements to meet specifications
2. communicate with and clarify customers' requirements following standard operating procedures
3. use your company's estimating system following standard operating procedures
4. obtain customer prices for products and quantity requested, plus potential different quantities and any run-on quantities
5. include all relevant information estimates
6. analyse quotations and provide calculations for added value, contribution and cost rates
7. deal with queries including alternative materials, methods of production and differing finishing or image enhancement techniques/processes
8. provide quotations to customers in the format required following standard operating procedures

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Review and revise production costs

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9. collect and obtain production cost information following standard operating procedures
10. compare production cost information with original quotations following standard operating procedures
11. identify any additional costs incurred following standard operating procedures
12. investigate differences between estimated and actual costs following standard operating procedures
13. report extra costs to relevant senior colleague(s) and action their decision
14. confirm extra costs to customers in line with contractual agreement

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## Knowledge and understanding

*You need to know and understand:*

1. confidentiality
2. copyright
3. how to communicate with internal and external customers
4. workplace policies at your company
5. safe handling of customer material
6. how to archive digital files/materials
7. selection of process
8. production stages used
9. materials and consumables used
10. use of management information systems
11. data collection
12. the factors relevant to mark up and margin
13. tender estimating
14. e-auctions
15. environmental issues
16. carbon offset

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### 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 costings.

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**Developed by** Improve

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**Version Number** 3

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**Date Approved** 30 Mar 2020

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**Indicative Review  
Date** 30 Mar 2020

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**Validity** Current

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**Status** Original

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**Originating  
Organisation** Proskills

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**Original URN** GQAPA03

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**Relevant  
Occupations** Printers, Printing Machine Minders and Assistants, Printing Trades

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**Suite** Print Administration

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**Keywords** print; administration; estimates; records; costing

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