

Position Title

Billing Clerk/Estimator

Date Prepared

January 24, 1995

Revised April 26, 2005

Department

Estimating

Location

Brainerd

Reports to: Lead Estimator & V.P. of Operations**I Position Purpose**

- Responsible for billing of all completed jobs within 24 hours of shipment with total accuracy.
- Back up other estimators and prepare cost estimates for printing jobs by determining the most economical method of manufacturing and ensuring the most competitive material and outside purchase pricing.

II Budget Dimensions

- Ensure all jobs billed include all customer alterations, upcharges for any deviations from the estimate, and all billable overs.
- Ensure all estimates are prepared within the set standards of the Company.

III Primary Functions Duties and Responsibilities**Quality**

- Learn and understand all aspects of estimating and production.
- Work in a quality oriented manner that promotes a positive example.

Estimate Planning

- Receives request for quote from Sales Rep or Customer.
- Determines the production centers needed to produce the job as specified.
- Develops a plan to accommodate all facets of the job.
- Evaluates all methods available for producing the job and selects the plan which produces the job in the most economical way with acceptable quality.
- Review and discuss any inaccuracies with Sales Rep or CSR.
- Works with vendors in obtaining best prices for supplies and with Sales Reps and CSR's in giving customers suggestions for improving quality and/or lowering the price of jobs.
- Advises and guides customers when necessary as to specifications of a job (size or style or type, size of book, kind of binding, etc.)
- Prepares customer quote sheet for customer, sales, or CSR.

Administration & Billing

- Bill each finished job making sure that all alterations that were performed are billed and any variance from the estimate is altered on the invoice.
- Maintains all estimate documentation and tracking according to the standard procedures set by management.
- Run and inspect all cost sheets for any variance from the estimate, correcting any time and material input errors.

- Keeps accurate record on all estimates so both company and customers are protected, should questions arise later.
- Keep a file on pertinent billing information and current price lists specific to each customer.
- Develops knowledge of inventory position, quantity stocked and usage.
- Researches and recommends cost savings potential to management.
- Other duties as assigned.

Policy

- Performs projects and assignments as requested by Lead Estimator and VP of Operations.
- Understand and support all established Company policies.
- Conduct and present yourself in a professional manner.
- Performs other duties as requested

IV Communication

External Contacts

- * Customers
- * Vendors

Nature or Purpose

- * Estimate Specifications
- * Pricing, Scheduling & Availability

Internal Contacts

- * Lead Estimator
- * Sales Representatives/CSR's
- * Peers
- * Scheduler
- * Purchasing
- * Manufacturing Supervisors
- * Accounting
- * Manufacturing Employees

Nature or Purpose

- * Direction, Feedback, Information Exchange
- * Estimate Specifications, Estimate Requests
- * Communicate & Support Each Other
- * Delivery Dates-lead time
- * Material Availability & Pricing
- * Estimate Specifications
- * Credit Checks
- * Estimate Specification

V Problem Solving

- Ensure proper specifications & information is provided
- Provide guidance on quality
- Provide support for fellow employees
- Accurately detail issues to CSR/Estimating Manager for resolution

VI Education and Experience

- Four years in the trade or graphic arts degree
- Possesses understanding of printing process
- Good communication skills
- Good interpersonal skills
- Leadership tendencies
- Excellent trouble shooting skills
- Computer experience preferred

VII Travel/Physical Exertion

- Travel as required which may include occasional overnight stay.

VIII Other Information

- Detail Orientated
- Strong Analytical & Organizational Skills
- Able to Work Independently
- Self-Motivated

Employee Signature _____ **Date**

Billing Procedure

- Have current copy of the daily bookings. (Keep track of jobs by number and due date.)
- Get job tickets from shipping and run cost sheets.
- Review cost sheet for variance.
- Work with purchasing to correct materials entered incorrectly.
- Work with accounting to correct any labor that was incorrectly entered.
- When you have an accurate cost sheet you are ready to bill:
- Begin by comparing to estimate. Estimate comes from CSR and should have written notes on all pertinent information (alts, upcharges, overs allowed, special shipping requests, etc.).
- Track back any rework on alts not noted in the estimate file.
- When all information is accounted for, bill job according to the estimate including freight, overs and alts.
- Give the ticket with the billing information to Accounting for invoicing.