



THE SNOW MILLIONAIRE MASTERY *Intensive*

INVOICING MODULE

The Invoicing Module is the last piece of the puzzle. This is where the Sales integrate with Accounting with the A/R Parameter Sheet. This is also where Production integrates with Accounting with the Summary Work Orders.

In this module we will discuss the following:

1. The Summary Sheet – this is one sheet that will summarize the work at a one site. It helps production and accounting with their respective work.
2. The Item Codes – item codes used in accounting software that will be used on a work order that allows accounting easier data input.



3. Invoicing – the final piece of the puzzle. Invoicing the client for the work and the extra work for a snow event. Invoicing should be a verification process and be done quickly sent to a client.

I. Summary Sheets

The Summary Sheet is a single summary sheet of all the work completed for each event for each site. All the work orders of the site are attached to the summary sheet and are tallied on this one sheet.

Productions job is to collect all work orders and has the tools to help document all the work and to track what is and what is not collected at the end of an event.

Productions job is also to summarize the work on a site. All work done on a site is grouped together and attached to a Summary Sheet. Then management summarizes the information: date of service, number of plows and shovels, hours, material, and extra work.

The Summary Sheet is an easy way to put the information on one sheet as well as an easy way for Accounting to read the information to invoice the client.

Then Accounting has just one sheet to look at when entering work order data for invoicing.



The item codes are created from the A/R Parameter Sheet and the information from this parameter sheet. The templates for the codes are for both residential and for commercial.

Residential Item Code Template

	Residential Snow and Walks
30PP Snow PP Driveways / Walks	Snow Removal of the Driveways and Walks Per Occurrence
30PH Snow PP Shovel Walks	Shovel Driveways and/or Walks Per Hour
30PH Snow PH Driveways / Walks	Snow Removal of the Lots, Driveways and/or Walks Per Hour.
30PH Snow PH Driveways / Walks Partial	Snow Removal of the Driveways and/or Walks - Partial.
30IC - Ice Control Driveways / Walks	Ice control was applied to the driveways and/or walkways.
30IC - Ice Control Driveways / Walks Partial	Ice control was applied to the driveways and/or walkways Partial.

Commercial Item Code Template



	Commercial Ice Control
31 - Ice Control:IC Lots / Walks	Ice Control of Lots and Walks Per Application
31 - Ice Control:IC Lots / Walks Partial	Ice Control of Lots and Walks Per Application Partial
31 - Ice Control-Lots	Ice control was applied to the Lot.
31 - Ice Control-Walks	Ice Control was applied to the Walkways.
31 - Ice Control - Lot Partial	Ice Control was applied to the Lot Partial.
31 - Ice Control - Walks Partial	Ice Control was applied to the Walks Partial.
31 - Liquid Ice Control	Liquid Ice Control was applied to the Lot and/or Walks.
	Commercial Snow and Walks
33 - Snow 3 Inch	Snow Removal 3 Inch Increments
33 - Snow 3 Inch:L1	Snow Removal of the Lots and Walks 1 - 3"
33 - Snow 3 Inch:L3	Snow Removal of the Lots and Walks 3.1 - 6"
33 - Snow 3 Inch:L6	Snow Removal of the Lots and Walks 6.1 - 9"
33 - Snow 3 Inch:L9	Snow Removal of the Lots and Walks 9.1 - 12"
33 - Snow 3 Inch:L12+	Additional Snow Inches Over 12" Per Inch



The item codes are created pre-season for each client. The clients' names will be added to the templates above with the pricing. The method of adding from the work order summary sheet into invoices will become easier and consistent. We will explain data entry in the next section.

Commercial Client Sample



33HomeDepot		0.00
33HomeDepot:IC Lots Salt	Ice Control of Lots Salting Per Application	45.00
33HomeDepot:IC Walks	Ice Control of Walks Per Application	24.00
33HomeDepot:L1	Snow Removal of the Lots and Walks 1 - 3"	95.00
33HomeDepot:L3	Snow Removal of the Lots and Walks 3.1 - 6"	142.00
33HomeDepot:L6	Snow Removal of the Lots and Walks 6.1 - 9"	197.00
33HomeDepot:L9	Snow Removal of the Lots and Walks 9.1 - 12"	250.00
33HomeDepot:L12+	Additional Snow Inches 20.00 Per Inch	20.00

Residential Client Sample

30SMITH		0.00
30SMITH:IC Driveways / Walks	Ice Control of Driveways and Walks Per Application	30.00
30SMITH:PP Driveways / Walks	Snow Removal of the Driveways and Walks Per Occurrence	80.00



III. Invoicing

Using a Summary Sheet and entering the item code into an invoice template will complete invoicing quickly and consistently.

Production uses the Summary Sheet to put each site together into one summary. After Production verifies that all work orders are collected and attached then Production also fills in the summary of the work. It is up to Production to add the information and to verify the work because Production has a better understanding of the work.

Accounting takes each summary sheet with the work orders attached and enters the data into the invoice template. They use the item codes that were set up pre-season with the pricing and the descriptions: fast and efficient.

It is best that a separate person verifies the summary sheet and the invoice before it is sent to the client. An example of the invoice template follows:



Serviced	Item	Quantity	Description	Rate	Amount
			February 12, 2012		
	70PH Snow PH Driveways / Walks	1	Snow removal from lots and driveways 6-10.9"	140.00	140.00
	70PH - Shovel PH	1	Shovel 6-10.9"	200.00	200.00
	70IC - Ice Control-Lots	3	Ice control was applied	120.00	360.00
	70PH Snow PH Driveways / Walks	1	Snow removal from lots and driveways 6-10.9"	140.00	140.00
	70PH - Shovel PH	1	Shovel 6-10.9"	200.00	200.00
	70IC - Ice Control-Lots	2	Ice control was applied	120.00	240.00
	70PH Snow PH Driveways / Walks	1	Snow removal from lots and driveways 6-10.9"	140.00	140.00
	70PH - Shovel PH	1	Shovel 6-10.9"	200.00	200.00
	70IC - Ice Control-Lots	1	Ice control was applied	120.00	120.00
			February 13, 2012		
	70PH Snow PH Driveways / Walks	1	Snow removal from lots and driveways. 1-5.9"	100.00	100.00
	70PH - Shovel PH	1	Shovel 1-5.9"	140.00	140.00
	70IC - Ice Control-Lots	2	Ice control was applied	120.00	240.00
	70PH Snow PH Driveways / Walks	1	Snow removal from lots and driveways 1-5.9"	100.00	100.00
	70PH - Shovel PH	1	Shovel 1-5.9"	140.00	140.00
	70IC - Ice Control-Lots	1	Ice control was applied	120.00	120.00
			February 14, 2012		
	71 - Snow PH Removal-Partial	1	Removal of snow from lots and driveways - Partial.	50.00	50.00
	74 - Shovel Partial	1	Partial Shoveling	70.00	70.00
	70IC - Ice Control-Lots	1	Ice control was applied	120.00	120.00

Congratulations!

This brings us to the end of the online course and materials. You now have all the systems and templates to implement into your own business. These are the building blocks to grow your business while not losing your sanity trying to do everything yourself.

Using the Q&A Calls over the next two months we will work out the details and work with the nuisances of your organization. This ensures that at the end this process you have set up the systems that you need to take your business to the next level and beyond.

See you on the calls,

Domenic