

B.6 Process customer orders for goods in a retail environment (Skillsmart Retail)
(SQA Unit Code-F0A1 04)

Element B.6.1 Check the availability of goods for retail orders

Element B.6.2 Process orders for retail customers

Overview

This standard covers two stages of processing customers' orders for goods. The first, involves checking if the goods the customer wants are available and telling the customer the terms of supply. The second is about processing the order and keeping the customer informed of progress.

B.6.1. Check the availability of goods for retail orders(SQA Unit Code-F0A1 04)

What you must be able to do

- 1 identify customers' needs accurately by asking suitable questions
- 2 identify the goods that will meet customers' needs and check with customers that these are satisfactory
- 3 find out who can supply the goods needed and on what terms
- 4 keep customers informed of progress in finding the goods they need
- 5 give customers clear, accurate and complete information about the availability of goods and the terms of supply

What you must know and understand

- (a) how to ask the right questions to find out exactly what customers want
- (b) which items are held in stock
- (c) how to check whether there is enough stock to meet the order
- (d) which items are available by order and which suppliers and manufacturers can provide them
- (e) how to check whether external suppliers and manufacturers can provide items, and on what terms
- (f) why you should keep customers informed of progress in finding the goods they need
- (g) why you should give customers clear, accurate and complete information about the terms of supply

B.6.2. Process orders for retail customers(SQA Unit Code-F0A1 04)

What you must be able to do

- 1 follow legal and company procedures for checking the customer's identity and credit status
- 2 follow company policy for offering to order goods the customer needs if they are not in stock
- 3 prepare accurate, clear and complete information about they order and pass this information promptly to the people responsible for fulfilling the order
- 4 provide accurate, clear, complete and timely information to those responsible for fulfilling the order
- 5 tell the right person promptly when you cannot process an order and explain the reasons clearly
- 6 let the customer know promptly and politely if their order cannot be delivered within the time agreed
- 7 store customers' details securely and show them only to people who have a right to see them

What you must know and understand

- (a) legal and company procedures for checking the customer's identity and credit status, and why you must follow them
- (b) who is responsible for fulfilling customers orders, what information they need from you, and why they need it
- (c) who is responsible for invoicing customers for orders, what information they need from you, and why they need it
- (d) who to tell if you cannot process an order
- (e) why you should tell the customer promptly about any delays in fulfilling their order
- (f) legal and company requirements relating to customer confidentiality
- (g) what might happen if customer information is not kept confidential
- (h) company procedures for storing customer information securely
- (i) who is entitled to see customer information, and in what situations