



National Unit Specification: general information

UNIT Handling Business Documents (SCQF level 5)

CODE F59W 11

SUMMARY

The Unit will help candidates acquire the knowledge and skills necessary to complete business documents for selling and purchasing goods and services and process claims for payment. It will also equip them with knowledge of stock control and related documentation that is important to the effective administrative operation of organisations.

This Unit is suitable for anyone wishing to learn how to accurately complete a range of business documents and to learn about stock control in an organisation.

OUTCOMES

- 1 Process business documents relating to selling goods and services.
- 2 Process business documents relating to purchasing goods and services.
- 3 Demonstrate knowledge of Stock Control Systems.

RECOMMENDED ENTRY

Entry is at the discretion of the Centre.

Administrative Information

Superclass: AY

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National Unit Specification: general information (cont)

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CREDIT VALUE

1 credit at Intermediate 2 (6 SCQF credit points at SCQF level 5*).

**SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from Access 1 to Doctorates.*

CORE SKILLS

There is no automatic certification of Core Skills in this Unit.

The Unit provides opportunities for candidates to develop aspects of the following Core Skills:

- ◆ Numeracy (SCQF level 4)

These opportunities are highlighted in the Support Notes of this Unit Specification.

National Unit Specification: statement of standards

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Acceptable performance in this Unit will be the satisfactory achievement of the standards set out in this part of the Unit Specification. All sections of the statement of standards are mandatory and cannot be altered without reference to SQA.

OUTCOME 1

Process business documents relating to selling goods and services.

Performance Criteria

- (a) Check that given records are up-to-date and accurate.
- (b) Credit customers are checked through organisation's credit control procedures.
- (c) Check that all calculations on given business documents are correct.
- (d) Check that all enquiries and complaints are dealt with in accordance with organisational procedures.

OUTCOME 2

Process business documents relating to purchase of goods and services.

Performance Criteria

- (a) Check that given records are up-to-date and accurate.
- (b) Check that all calculations on given business documents are correct.
- (c) Check that all enquiries and complaints are dealt with in accordance with organisational procedures.

OUTCOME 3

Demonstrate knowledge and understanding of Stock Control Systems.

Performance Criteria

- (a) Demonstrate knowledge and understanding in the use of stock control documents.
- (b) Demonstrate knowledge and understanding of procedures involved in the stock control of an organisation.

National Unit Specification: statement of standards (cont)

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EVIDENCE REQUIREMENTS FOR THIS UNIT

Written and/or Oral and Product evidence is required to demonstrate that candidates have all Outcomes to the standard specified in the Outcomes and Performance Criteria.

The assessment(s) will be carried out under closed-book supervised conditions. Assessment should take place at appropriate points during delivery of the Unit.

The Evidence for the Outcomes is shown below:

Outcomes 1 and 2 — Product Evidence

Candidate must accurately produce a set of business documents which must include an enquiry, quotation, order, invoice, delivery note, credit note, statement and cheque. VAT; transport charges; and trade discount must be included on the invoices. Enquiries and complaints must be covered. The use of pricelists should also be included.

Candidates must also provide correct answers to two short answer questions about Credit Control. Should candidates fail to correctly answer one or both questions, re-assessment for incorrectly question(s) must follow.

In Outcomes 1 and 2, all documents must be completed accurately under closed-book conditions, with one error allowance in each, on first submission. This error can be indicated by the tutor. Candidates must remediate the error to make the document 100% correct. A new set of documents must be completed if candidates fail to reach the required standard.

Outcome 3 — Written and/or Oral Evidence

The Candidate must correctly answer a set of multiple choice questions which test their knowledge of:

- ◆ handling deliveries
- ◆ keeping records and ordering stock
- ◆ organisational procedures
- ◆ stores control
- ◆ correct storage facilities including security
- ◆ stock checks
- ◆ delivery checks

Candidates must answer six out of eight questions correctly to achieve Outcome 3. When candidates fail to reach the agreed threshold score, re-assessment should follow using an alternative instrument of assessment.

The Assessment Support Pack for this Unit provides sample assessment material. Centres wishing to develop their own assessments should refer to the Assessment Support Pack to ensure a comparable standard.

National Unit Specification: support notes

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This part of the Unit Specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 40 hours.

GUIDANCE ON THE CONTENT AND CONTEXT FOR THIS UNIT

This Unit is a mandatory Unit of the National Certificate Group Award in Administration at SCQF level 5, but can also be taken as a free-standing Unit.

This Unit would be suitable for anyone wishing to learn about business documentation and stock control in an organisation.

This Unit is set in the context of the modern business environment and candidates must be introduced to up-to-date business documentation and stock control procedures. Use of realistic documentation is essential.

Outcomes One and Two

Candidates should be introduced to the concept of processing business documents for both sales and purchases. Candidates should also be introduced to Credit Control and its role as part of this Outcome. VAT, trade discount should be explained and applied for inclusion in invoices. The use of pricelists should also be introduced. Accuracy should be encouraged in all cases. Simulated documentation, both manual and/or computerised should be utilised from the beginning and the use of each document clearly explained.

Different types of sales organisations should be discussed with possible clientele and purchasing requirements. Realistic timescales from start to finish of transactions should be covered, with attention being taken in dating documentation appropriately.

Outcome Three

The importance and use of efficient stock control should be emphasized from the beginning to candidates. Scenarios could be used to demonstrate stock control, from basic stock control in a stationery cupboard in an organisation, to large scale stock control in sales organisations. Manual records could be used to demonstrate a manual stock control system, with stock records cards, summary sheets etc. The procedures regarding stock control should be explained, from delivery of stock, including completion of required documentation, checking procedures, handling and appropriate storage of stock, stock taking, identifying and reporting damaged stock, issuing of stock and recording procedures.

National Unit Specification: support notes (cont)

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GUIDANCE ON LEARNING AND TEACHING APPROACHES FOR THIS UNIT

Candidates should be encouraged to take a positive attitude towards the quality of their own work and be self-correcting. Realistic materials and documentation should be used throughout and a thematic approach adopted where possible. Candidates should also be encouraged to work within given deadlines.

Simulated exercises could be used to enhance learning with candidates assuming both roles of buyer and seller in different exercises to facilitate their understanding of both sides of the transaction.

The importance and meaning of calculating the correct trade discount and VAT amount should be stressed throughout the simulated exercises. Candidates may make use of calculators.

The importance of stock control in any size of organisation should be stressed, and both manual and electronic systems could be included in the teaching content. Candidates should be asked to draw on their existing knowledge of stock control with regard to electronic procedures in, for example, shopping transactions, to aid understanding. Simulated stock exercises could also be used for formative assessment, utilising stock record cards, summary sheets, delivery notes, orders and requisitions for this purpose.

OPPORTUNITIES FOR CORE SKILL DEVELOPMENT

It is envisaged that candidates by demonstrating their ability to carry out calculations in Learning Outcomes 1 and 2, will be able to develop aspects of the Core Skills in *Numeracy*.

GUIDANCE ON APPROACHES TO ASSESSMENT FOR THIS UNIT

The evidence required will consist of accurate completion of business documents in a sales transaction, from Letter of Enquiry to Statement for Learning Outcomes 1 and 2.

There is no time allocation for these assessments and it would be envisaged that Outcomes 1 and 2 could be completed holistically as one combined assessments. A suitable instrument of assessment would be a practical assignment/or exercises.

In Outcome 3, a suitable method of assessment would be a set of eight multiple choice questions.

Reference should be made to the Assessment Support Pack available for this Unit.

National Unit Specification: support notes (cont)

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Opportunities for the use of e-assessment

E-assessment may be appropriate for some assessments in this Unit. By e-assessment we mean assessment which is supported by information and communications technology (ICT), such as e-testing or the use of e-portfolios or e-checklists. Centres which wish to use e-assessment must ensure that the national standard is applied to all candidate evidence and that conditions of assessment as specified in the Evidence Requirements are met, regardless of the mode of gathering evidence. Further advice is available in *SQA Guidelines on Online Assessment for Further Education (AA1641, March 2003)*, *SQA Guidelines on e-assessment for Schools (BD2625, June 2005)*.

CANDIDATES WITH DISABILITIES AND/OR ADDITIONAL SUPPORT NEEDS

The additional support needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments, or considering alternative Outcomes for Units. Further advice can be found in the SQA document *Guidance on Assessment Arrangements for Candidates with Disabilities and/or Additional Support Needs* (www.sqa.org.uk).

History of changes:

| Version | Description of change | Date |
|---------|---|------------|
| 02 | Removal of cash discount and removal of 'either manually or electronically' | 02/09/2010 |
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