

Unit DR99 04 (2R4)

Prepare customer accounts and deal with departures

This Unit has the following elements:

Element 1 (2R4.1)

Prepare and maintain customer accounts

Element 2 (2R4.2)

Deal with the departure of customers

Candidate Name:

Assessment Centre:

I have completed the requirements of this Unit.

Candidate signature: _____ **Date:** _____

I can confirm the candidate has completed all requirements of this Unit.

Assessor signature: _____ **Date:** _____

**Assessor counter signature
(where applicable)** _____ **Date:** _____

IV signature: _____ **Date:** _____

**IV counter signature
(where applicable)** _____ **Date:** _____

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Unit Summary

This Unit is about maintaining customer accounts by entering charges and adjustments into the account. It also covers dealing with departing customers by completing the relevant documentation and procedures and recording customer comments.

The typical day-to-day activities you might carry out for this Unit include:

- ◆ entering charges against customer accounts and recording adjustments
- ◆ filing account information
- ◆ dealing with credit limits
- ◆ solving customer problems
- ◆ presenting accounts to the customer
- ◆ taking payments
- ◆ recording customer comments
- ◆ promoting the organisation to the customer

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Element 1 (2R4.1)

Prepare and maintain customer accounts

What you must do (circled numbers must be observed)		Assessor initials/date
①	Enter charges regularly and accurately against customer accounts in the account system	
②	Record any account adjustments accurately against customer accounts	
③	File and store account documents correctly at all times	
④	Complete customer accounts for the customer	
⑤	Make sure customer accounts cannot be accessed by unauthorised people	

What you must cover (minimum requirement for observation in italic and bold)	Activity/Evidence (insert tick or supplementary reference)					
	1	2	3	4	5	6
Evidence for the remaining points may be assessed through questioning or witness testimony						
<i>Account systems, at least one required from the following:</i>						
computerised systems						
manual systems						
<i>Account adjustments, at least two required from the following:</i>						
charges						
allowances/discounts						
refunds						
deposits/prepayments						
transfers						

Unit DR99 04 (2R4)**Prepare customer accounts and deal with departures****Element 1 (2R4.1)****Prepare and maintain customer accounts**

Candidate name:		Assessor initials/date
No	Activity	
1		
2		
3		
4		
5		
6		

Unit DR99 04 (2R4)

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Element 2 (2R4.2)

Deal with the departure of customers

What you must do (circled numbers must be observed)		Assessor initials/date
Evidence for the remaining points may be assessed through questioning or witness testimony		
①	Prepare documents and other necessary items before the customer departs	
②	Present the account to the customer for confirmation	
③	Check customer account details and request payment as required	
④	Complete documentation and deal with it using the correct account or booking system	
⑤	Complete all other procedures for customer departures	
⑥	Record customer comments, complaints and suggestions and feed them back to the appropriate person or department	
7	Promote establishment services and facilities as appropriate	

What you must cover (minimum requirement for observation in italic and bold)	Activity/Evidence (insert tick or supplementary reference)					
	1	2	3	4	5	6
Evidence for the remaining points may be assessed through questioning or witness testimony						
<i>Customer account, at least two required from the following:</i>						
those where part payment is required						
those where full payment is required						
those where the account does not require immediate settlement						
<i>Account or booking system, at least one required from the following:</i>						
computerised						
manual						

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Element 2 (2R4.2)

Deal with the departure of customers

Candidate name:		Assessor initials/date
No	Activity	
1		
2		
3		
4		
5		
6		

Unit DR99 04 (2R4)**Prepare customer accounts and deal with departures**

What you must know for the Unit	
For the whole Unit	
K1	Your organisation's standards for customer care and why it is important to follow these
K2	Basic legal requirements relating to preparing and maintaining customer accounts
K3	Your organisation's procedures for customer accounts and why it is important to follow these
Element 1 (2R4.1) Prepare and maintain customer accounts	
K4	Why customer accounts must be updated regularly with charges and adjustments
K5	Why it is important to give accurate verbal and written information to customers
K6	Why customer accounts must be secured from unauthorised access
K7	The types of unexpected situations and problems that may occur with customer accounts and how to deal with these correctly
Element 2 (2R4.2) Deal with the departure of customers	
K8	Basic legal requirements relating to accommodation, goods and services for sales
K9	Safe and hygienic working practices when dealing with the departure of customers
K10	Your organisation's procedures for customer departures
K11	Why complaints, comments and suggestions should be recorded and fed back to the appropriate person/department
K12	Why details of any extra charges should be available to the customer
K13	The types of unexpected situations and problems that may occur with customer departures and how to deal with these correctly
K14	Opportunities to promote the organisation when the customer is leaving
Knowledge evidence retained	

Assessor signature: _____**Date:** _____

Unit DR99 04 (2R4)**Prepare customer accounts and deal with departures**

Candidate name:		Assessor initials/date
Ref	Supplementary evidence	
A		
B		
C		
D		
E		
F		
G		
H		

Assessor Feedback