

H124 04 (CFAS8.1) Input and access data in your organisation's information systems

What is this Unit about?

This Unit is about sales data. You must be able to use both manual and computerised information systems to store and access information and to supply it to others.

The Unit is designed to ensure that you appreciate the importance of storing information in the right place as well as being able to deal with matters such as managing out of date information, handling confidential information and working within legal and regulatory limits.

Who is this Unit for?

This Unit is suitable for face-to-face selling, telesales and online selling.

Sales Executives.

Outcomes of effective performance

You must be able to:

- 1 Ensure that information sources are clear and fully accessible.
- 2 Ensure that the information supplied is correctly transcribed and is in an appropriate format before entering it into the system.
- 3 Input and store sales data following organisational procedures.
- 4 Access sales data following organisational procedures.
- 5 Keep information confidential to those authorised to know it.
- 6 Meet the requirements of data protection legislation.
- 7 Identify potential breaches of confidentiality or problems relating to confidential information and follow organisational guidelines to inform appropriate people.
- 8 Ensure that all out of date information is dealt with following organisational guidelines.
- 9 Identify opportunities for improving data collection and recording systems in your area of responsibility and inform those with authority to make the change.
- 10 Follow organisational health and safety procedures relating to the use of computer equipment.

Behaviours that underpin effective performance

- 1 You work within your own area of responsibility and limits of authority.
- 2 You demonstrate a broad awareness of your organisation's software system.
- 3 You input data accurately and correctly.
- 4 You store data securely following organisational procedures.
- 5 You work with others to develop data inputting, storage and security practices.
- 6 You work within Data Protection and Health and Safety legislation.
- 7 You follow organisational procedures for storing information.
- 8 You contribute to organisational improvements and work practices.

Knowledge and Understanding requirements

You need to know and understand

General Knowledge and Understanding

- 1 The uses of IT in the sales function.
- 2 The reasons why information is needed for sales activities.
- 3 Sources of information and how they can be gathered and used.
- 4 The reasons for using an established data storage system.
- 5 The role of both manual and computerised systems and the advantages and disadvantages of each.
- 6 Ways of classifying information.
- 7 The importance of having organisational procedures for storing information.
- 8 How to identify information to match sales team requirements.
- 9 The different methods of presenting information.
- 10 How to plan and organise searches for information.
- 11 The implications for the organisation of entering incorrect data.
- 12 Why certain types of information are confidential.
- 13 What is a breach of confidentiality and what are the consequences if there is one.

Industry/sector specific Knowledge and Understanding

- 1 The legal, regulatory and ethical requirements for data inputting and maintaining confidentiality in your industry/sector.
- 2 Industry protocol for data storage.

Context specific Knowledge and Understanding

- 1 Data input and access requirements for the sales function.
- 2 Potential information sources.
- 3 Organisational procedures for disclosing confidential information.
- 4 What constitutes confidential information.

- 5 Who is authorised to receive and access confidential information.
- 6 What is a breach of confidentiality and what action is taken should a breach occur.
- 7 How information is stored and accessed.
- 8 Methods, formats and templates for displaying organisational information.
- 9 Software and hardware used by the organisation.
- 10 The scope of your area of responsibility and associated authority.

Evidence Requirements

To achieve this Unit you will need to ensure that your evidence covers all Performance Criteria and Knowledge and Understanding.

- 1 As part of the assessment for this qualification, you must have access to a work or realistic work environment (RWE).
- 2 You must provide evidence that shows you have input and accessed data in your organisation's information system over a sufficient period of time on different occasions for your assessor to be confident that you are competent.
- 3 You must show evidence of being able to use both manual and computerised information systems.
- 4 You must provide evidence that all input and access to sales data follows:
 - ◆ regulatory requirements
 - ◆ legislative requirements
 - ◆ the policies and procedures of your own organisation.

