

Title	Establish and maintain stock levels, and collate and dispatch customer orders in a retail or distribution facility		
Level	4	Credits	10

Purpose	People credited with this unit standard are, in a retail or distribution facility, able to: establish stock levels; maintain stock levels; plan and coordinate selection and collation of customer orders; and dispatch customer orders.
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Classification	Retail, Distribution, and Sales > Stock Control
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Available grade	Achieved
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Guidance Information

- 1 Definitions

Dispatch refers to transportation by courier, rail, truck, or airfreight.

Distribution facility refers to a workplace where the primary focus is on storage and distribution of stock.

Organisational procedures may include but are not limited to the applicable procedures found in the following – organisational performance guidelines and standards; Government and local body legislation.

Retail facility refers to a workplace where the primary focus is on customers purchasing goods or services.
- 2 Legislation relevant to this unit standard includes but is not limited to – Health and Safety at Work Act 2015; and Health and Safety Regulations 1995.
- 3 All assessment tasks must be carried out in accordance with organisational procedures.

Outcomes and performance criteria

Outcome 1

Establish stock levels in a retail or distribution facility.

Performance criteria

- 1.1 Stock levels are established by agreement of stakeholders.

Range	stakeholders may include but are not limited to – owner/operator, staff, distributors, outlet management, suppliers.
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- 1.2 Factors affecting stock requirements are identified and incorporated into setting of stock levels.
- Range factors include but are not limited to – stock turnover, storage capacity, seasonal variations, budget, sales, promotions, timely delivery;
evidence for three factors is required.
- 1.3 Lead times for regular and alternative stock suppliers are calculated and recorded.
- 1.4 Documents relating to establishment of stock levels are completed, distributed to stakeholders, and recorded.

Outcome 2

Maintain stock levels in a retail or distribution facility.

Performance criteria

- 2.1 Factors affecting stock level maintenance are recognised, and action is taken to maintain stock levels.
- Range factors may include but are not limited to – change in lead times, change in demand, supply delays, discontinued stock;
action may include but is not limited to – using alternative supplier, informing stakeholders, amending stock levels;
evidence for an action for each of three factors is required.
- 2.2 Any changes to stock levels are agreed with stakeholders.
- Range stakeholders may include but are not limited to – owner/operator, staff, distributors, outlet management, suppliers.
- 2.3 Documents relating to maintenance of stock levels are completed.

Outcome 3

Plan and coordinate selection and collation of customer orders in a retail or distribution facility.

Performance criteria

- 3.1 Orders for dispatch are recorded.
- Range record includes – customer name, customer address, date required by, goods required, quantity, packaging requirements, special requirements.

3.2 A plan for selection and collation of customer orders is prepared in accordance with dispatch requirements.

Range includes but is not limited to – resources, documentation.

3.3 Customer orders are selected and collated.

3.4 Any problems with selection and collation of customer orders are identified and corrective action is taken.

3.5 Selection and collation of customer orders is recorded.

Outcome 4

Dispatch customer orders in a retail or distribution facility.

Performance criteria

4.1 Orders are dispatched in accordance with dispatch schedule.

4.2 Dispatch documents are completed.

Range documents may include but are not limited to – customs forms, postage, consignment notes, dispatch schedule, delivery schedule, docket, invoice.

4.3 Stock control system is updated with dispatch details.

Range details may include but are not limited to – consignment, invoice, customer, dispatch, carrier.

Replacement information	This unit standard replaced unit standard 11963, unit standard 11977, and unit standard 11986.
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Planned review date	31 December 2027
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	16 April 2015	31 December 2024
Review	2	8 December 2016	31 December 2024
Review	3	26 January 2023	N/A

Consent and Moderation Requirements (CMR) reference	0112
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Comments on this unit standard

Please contact Ringa Hora Services Workforce Development Council qualifications@ringahora.nz if you wish to suggest changes to the content of this unit standard.