

<b>Title</b>	<b>Plan and prepare for, manage, and record a stocktake in a retail or distribution environment</b>		
<b>Level</b>	<b>4</b>	<b>Credits</b>	<b>5</b>

<b>Purpose</b>	People credited with this unit standard are able to plan and prepare for, manage, and record a stocktake in a retail or distribution environment.
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<b>Classification</b>	Retail, Distribution, and Sales > Retail and Distribution Management
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<b>Available grade</b>	Achieved
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### Guidance Information

#### 1 Definitions

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

*Organisational procedures* referred to in this unit standard 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 environment* refers to workplaces where the primary focus is on customers purchasing goods or services.

#### 2 Recommended skills and knowledge: Unit 11966, *Count and record stock in a retail or distribution environment*.

#### 3 All tasks are to be carried out in accordance with organisational procedures.

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### Outcomes and performance criteria

#### Outcome 1

Plan and prepare for a stocktake in a retail or distribution environment.

#### Performance criteria

1.1 Products and areas included in stocktake are recorded and clearly identified in the floor plan.

1.2 Stocktake resources are identified, assembled, and allocated.

Range resources may include but are not limited to – personnel, documentation, equipment.

- 1.3 Stocktake cut off point is selected and identifies the stock to be counted.  
 Range cut off point may include but is not limited to – last delivery, last dispatch, last sale to be included in stocktake.
- 1.4 Stocktake inventory records are provided.
- 1.5 Incoming and outgoing goods are isolated from stocktake.
- 1.6 Potential problems with stocktake are identified and corrective action is taken.  
 Range potential problems may include but are not limited to – discrepancies in floor plan, location of products, allocation of personnel, allocation of resources, faulty or damaged products; evidence is required for two potential problems.

**Outcome 2**

Manage a stocktake in a retail or distribution environment.

**Performance criteria**

- 2.1 Personnel and resources allocated are managed during a stocktake.
- 2.2 Stocktake is completed.

**Outcome 3**

Record a stocktake in a retail or distribution environment.

**Performance criteria**

- 3.1 Stocktake records are compiled.
- 3.2 Variances between stock held and stock records are identified and recorded.
- 3.3 Stocktake records are filed.

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<b>Planned review date</b>	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	31 October 1997	31 December 2018
Review	2	29 July 2002	31 December 2018
Review	3	21 November 2008	31 December 2018
Review	4	8 December 2016	31 December 2024
Review	5	26 January 2023	N/A

**Consent and Moderation Requirements (CMR) reference**

0112

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](mailto:qualifications@ringahora.nz) if you wish to suggest changes to the content of this unit standard.