

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 and 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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Explanatory notes

- 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* 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 facility* refers to a workplace where the primary focus is on customers purchasing goods or services.
- 2 Any relevant Acts, regulations, and bylaws must be complied with during assessment against this standard.

Outcomes and evidence requirements

Outcome 1

Establish stock levels in a retail or distribution facility.

Evidence requirements

- 1.1 Stock levels are established by agreement of stakeholders in accordance with organisational procedures.
 - Range stakeholders may include but are not limited to – owner/operator, staff, distributors, outlet management, suppliers.

1.2 Factors affecting stock requirements are identified and incorporated into setting of stock levels in accordance with organisational procedures.

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 in accordance with organisational procedures.

Outcome 2

Maintain stock levels in a retail or distribution facility.

Evidence requirements

2.1 Factors affecting stock level maintenance are recognised, and action is taken to maintain stock levels in accordance with organisational procedures.

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 in accordance with organisational procedures.

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 in accordance with organisational procedures.

Outcome 3

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

Evidence requirements

3.1 Orders for dispatch are recorded in accordance with organisational procedures.

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 and organisational procedures.

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

3.3 Customer orders are selected and collated in accordance with organisational procedures.

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

3.5 Selection and collation of customer orders is recorded in accordance with organisational procedures.

Outcome 4

Dispatch customer orders in a retail or distribution facility.

Evidence requirements

4.1 Orders are dispatched in accordance with dispatch schedule and organisational procedures.

4.2 Dispatch documents are completed in accordance with organisational procedures.

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 in accordance with organisational procedures.

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 2021
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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	N/A
Review	2	8 December 2016	N/A

Consent and Moderation Requirements (CMR) reference	0225
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Please note

Providers must be granted consent to assess against standards (accredited) by NZQA, before they can report credits from assessment against unit standards or deliver courses of study leading to that assessment.

Industry Training Organisations must be granted consent to assess against standards by NZQA before they can register credits from assessment against unit standards.

Providers and Industry Training Organisations, which have been granted consent and which are assessing against unit standards must engage with the moderation system that applies to those standards.

Requirements for consent to assess and an outline of the moderation system that applies to this standard are outlined in the Consent and Moderation Requirements (CMR). The CMR also includes useful information about special requirements for organisations wishing to develop education and training programmes, such as minimum qualifications for tutors and assessors, and special resource requirements.

Comments on this unit standard

Please contact ServicelQ qualifications@ServicelQ.org.nz if you wish to suggest changes to the content of this unit standard.