| | |
|---|---|
| **Unit Title:** | **Process customer orders for goods in a retail environment** |
| OCR unit number: | 5 |
| Sector unit number: | B.06 |
| Level: | 2 |
| Credit value: | 3 |
| Guided learning hours: | 19 |
| Unit reference number: | R/503/5662 |

## Unit purpose and aim

This unit assesses the occupational competence of individuals responsible for processing customer orders in a retail environment.

| Learning Outcomes | Assessment Criteria |
|---|---|
| **The Learner will:** | **The Learner can:** |
| 1 Understand the importance of customer service in relation to processing customers' orders | 1.1 explain the importance of giving customers clear, accurate and complete information about the terms of supply<br>1.2 explain the importance of keeping customers informed of the progress of their orders |
| 2 Understand the correct use of customer information in relation to processing customers' orders | 2.1 describe the information that must be obtained from customers when they place orders<br>2.2 explain why information is needed from customers when they place orders, including any information that is required by law<br>2.3 outline the legal and organisational requirements relating to customer confidentiality<br>2.4 explain the consequences of not keeping customer information confidential |
| 3 Be able to find out what customers want to order | 3.1 ask questions to clarify customers' requirements<br>3.2 use product information to help customers who are unsure which exact products will best meet their requirements |
| 4 Be able to check the availability of the goods customers want to order | 4.1 describe the available sources of supply<br>4.2 check the availability of goods and the terms and conditions of supply<br>4.3 offer alternative options to customers if the required goods are not currently in stock |

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| Learning Outcomes | Assessment Criteria |
|---|---|
| 5 Be able to process orders for customers | 5.1 check customer identity and credit status in accordance with legal and organisational procedures<br>5.2 prepare accurate and complete orders using the organisation's required format<br>5.3 communicate orders to those responsible for fulfilling them in line with organisational procedures<br>5.4 maintain the requisite level of confidentiality when storing, using and sharing customer information |

## Assessment

This unit requires workplace assessment of occupational competence. It is internally assessed by centre staff and externally assessed by an OCR External Verifier.

The unit is competence-based. This means that it is linked to the candidate's ability to competently perform a range of tasks associated with their work.

The unit needs to be assessed in line with the relevant Sector Skills Council's (SSC's) Assessment Strategy or Principles. Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Assessment conducted by an external/peripatetic assessor must adhere to section 4.2.1 of Skillsmart Retail's '*Retail Qualifications Assessment Principles'*. As such, OCR requires the line manager or the owner/manager to sign and date the bottom of each unit Evidence Record Sheet (ERS) to both confirm their involvement and the candidate's competence. This should be on or prior to the signature and date provided by the assessor.

## Evidence requirements

OCR does not stipulate the mode of delivery for the teaching of the content of this unit. Centres are free to deliver this unit using any mode of delivery that meets the needs of their candidates. Centres should consider the candidates' complete learning experience when designing programmes of learning.

## Guidance on assessment and evidence requirements

You should refer to the '*Admin Guide: Vocational Qualifications* (A850)' for *Notes on Preventing Computer-Assisted Malpractice*.

## National Occupational Standards (NOS) mapping/signposting

This unit is based on the NOS reference SSR.B207, SSR.B208

**NOS can be viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk**.


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## Functional skills signposting

This section indicates where candidates may have an opportunity to develop their functional skills.

| **Functional Skills Standards** | | | | | |
|---|---|---|---|---|---|
| **English** | | **Mathematics** | | **ICT** | |
| Speaking and Listening | ✔ | Representing | ✔ | Use ICT systems | ✔ |
| Reading | ✔ | Analysing | ✔ | Find and select information | ✔ |
| Writing | ✔ | Interpreting | ✔ | Develop, present and communicate information | ✔ |

## Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications' (A850)* on the OCR website www.ocr.org.uk .