Competency Standard

UNIT TITLE: APPLY POINT OF SALE HANDLING TECHNIQUES	**NOMINAL HOURS:** 30
UNIT NUMBER: D2.TCS.CL5.01	
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to operate point of sale equipment and provide related customer services.	
ELEMENTS AND PERFORMANCE CRITERIA	**UNIT VARIABLE AND ASSESSMENT GUIDE**
Element 1: Prepare point of sale for service **1.1** Identify *point of sale equipment, facilities and systems* **1.2** *Prepare point of sale equipment, facilities and systems* for use **1.3** *Open the point of sale area* for service **Element 2: Operate point of sale equipment** **2.1** *Operate point of sale equipment, facilities and system* according to manufacturer's instructions **2.2** Operate point of sale *wrapping and packing equipment* and use *wrapping and packing materials* according to manufacturer's instructions and house policies	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. This unit applies to all industry sectors that provides point of sale facilities within the labour divisions of the hotel and travel industries and may include: 1. Tour Operation 2. Travel Agencies *Point of sale equipment, facilities and systems* may be related to: • Cash register/terminal, including stand-alone and integrated units and systems, and cash drawers • Scanners • Electronic labelling equipment • Electronic funds transfer point of sale (EFTPOS) facilities • Portable data entry equipment • Internal cash transfer systems

Element 3: Conduct point of sale transactions **3.1** *Process sales* in accordance with customer wishes **3.2** *Accept payment* for goods and services purchased **3.3** *Establish rapport with customers* during the service **3.4** *Optimise sales* for each transaction, as appropriate **3.5** *Process returns, refunds and exchanges* **3.6** *Create and maintain efficient service levels* at point of sale area **3.7** *Conduct bag searches* **3.8** Complete *point of sale documentation* to accompany transactions **Element 4: Wrap and pack items** **4.1** *Select appropriate wrapping and packaging material* for goods **4.2** *Wrap and pack items* purchased by customers **4.3** *Make arrangements to forward or transfer goods* in accordance with customer requirements **Element 5: Close the point of sale area** **5.1** Close and *reconcile the register/terminal* **5.2** Shut down point of sale equipment	• Weighing machines • Internal communication systems • Security systems • Wrapping and packing equipment • Documentation including all sales, complaint, refund, lay-by, returned goods and other operational and advice related forms, vouchers, brochures and documents. *Prepare point of sale equipment, facilities and systems* may include: • Turning on power to electrical units, as required • Conducting pre-start operational checks • Following manufacturer's instructions • Complying with in-house procedures and requirements • Replenishing depleted supplies required to support point of sale operation • Obtaining money to enable sales transactions, including floats and change • Changing dates and operator identification on point of sale registers/terminals, if required • Replacing register/terminal audit roll • Cleaning equipment and facilities • Confirming operational readiness of all equipment, facilities and systems • Tidying service area. *Open the point of sale area* may include: • Confirming operational readiness with supervisor • Obtaining authority to commence processing sales • Removing barriers • Unlocking doors

5.3 *Requisition items* required for next session **5.4** *Activate security systems*, where appropriate **5.5** Finalise *internal documentation related to transactions and service* **5.6** Notify management of *issues arising during service session*	• Turning on service light • Inviting customers to the sales processing area. *Operate point of sale equipment, facilities and systems* should include: • Registers/terminals: ▪ Opening register/terminal ▪ Recording/registering sales including single and multiple sales using scanning facilities and alpha-numeric and function keys ▪ Performing price /product look ups (PLU) ▪ Cancelling items ▪ Entering 'no sales' ▪ Activating receipt function ▪ Performing item enquiries ▪ Calculating discounts ▪ Entering 'reduced to clear' items ▪ Changing prices/system to accommodate 'happy hours' ▪ Performing closing functions according to house practice, including reconciliation and clearing procedures ▪ Locking registering • Scanners: ▪ Using hand-held scanners and integrated scanners ▪ Reading prices from coded items ▪ Conducting single and multiple reads ▪ Operating the terminal/register in conjunction with scanner operation

	• Electronic labelling equipment:
	  ▪ Generating electronic adhesive and other labels
	  ▪ Producing bar code labels to integrate with electronic terminals/sales
	• EFTPOS facilities:
	  ▪ Processing credit and debit sales
	  ▪ Adhering to house/floor limits, as applicable
	  ▪ Refusing/regretting declined transactions
	  ▪ Processing electronic sales documentation
	  ▪ Performing ‘cash out’ function, where applicable
	  ▪ Performing required security checks to validate transactions
	• Portable data entry equipment:
	  ▪ Initiating equipment
	  ▪ Charging the unit and exchanging batteries/power units
	  ▪ Entering stock data according to house policies
	  ▪ Amending data, including adding stock to initial entries, allowing for sold and/or damaged, or out-of-date stock, correcting input errors
	  ▪ Transferring/transmitting data
	  ▪ Creating totals and generating required reports and/or statistics resulting from use of portable data entry equipment
	• Cash transfer systems:
	  ▪ Manual or pneumatic
	  ▪ Obtaining change
	  ▪ Forwarding cash from point of sale.

	• Weighing machines:
	  ▪ Operating electronic or other scales, including stand-alone scales and scales integrated with terminal/register
	  ▪ Clearing scale readings
	  ▪ Setting price per item for different items
	  ▪ Reading scales
	  ▪ Adjusting scales
	  ▪ Identifying false reads and errors
	  ▪ Calculating selling prices
	  ▪ Ensuring hygienic condition of scales
	• Internal communication:
	  ▪ Making public announcements
	  ▪ Using internal telephone system, including communication with individuals and departments
	  ▪ Using internal paging system to contact or alert other staff
	  ▪ *Security systems and devices*:
	  ▪ Tagging items with security devices
	  ▪ Removing security tags and devices from items
	  ▪ De-activating security devices and alarms
	  ▪ Re-setting security devices and systems
	  ▪ Over-riding security alerts and alarms.

	Wrapping and packing equipment may include: • Plastic and paper wrapping equipment, including shrink-wrap and heat-seal items, where applicable and rollers and cutters • Tape and string dispensers. *Wrapping and packing materials* may include: • Paper, bubble wrap, tissue paper and plastic film, including gift wrapping items • Styrofoam spacers • Pre-used/re-cycled cartons, boxes and crates • Built boxes and containers • Bags and pouches • Tubing, hat boxes and suit bags • Bottle bags • Envelopes • Mailers • Tape, string and other ties, including decorative tape and ribbons. Process sales may include: • Scanning item • Using product look ups (PLU) function/keys • Referring to hard copy price lists • Reading and interpreting labels • Visually identifying product or service to be paid for • Entering data into register/terminal using keys • Factoring in allowable discounts

	• Determining final selling price for items purchased, including sub-totalling purchases if requested by customer • Registering transaction, including activation of item and/or departmental keys, where applicable • Explaining charges to customers • Resolving disputes relating to selling prices and prices charged, including techniques for addressing situations where customers have been over-charged • Removing items from the transaction as required by customer • Re-keying/re-processing transactional errors. *Accept payment* should relate to: • Accepting payment by cash • Identifying and processing non-cash payment options as accepted by the host enterprise, including cheques, travellers' cheques, debit and credit cards, vouchers, accounts including charges posted to guest room • Demonstrating effective and secure cash handling skills • Calculating and supplying correct change. *Establish rapport with customers* may include: • Greeting customer, including use of customer name, where appropriate • Demonstrating respect for and appreciation of the customer and their purchase • Responding to customer questions • Initiating and participating in polite conversation with customers • Notifying customers of specials available • Congratulating customer on their purchase • Entering customer into applicable competitions, as applicable, on the basis of their purchase.

	Optimise sales may include: • Making recommendations and suggestions • Applying up-selling techniques • Applying add-on sales techniques. *Process returns, refunds and exchanges* will include: • Evaluating transaction against house policies and legal requirements that apply to return, refund or exchange transactions • Acting as an agent for the customer while protecting the position of the enterprise • Applying fairness and high levels of customer service skills to each return, refund or exchange transaction • Apologising, where appropriate • Explaining situations where a return, refund or exchange cannot be processed • Verifying proof of purchase, or proof of ownership, for return, refund or exchange transactions • Completing the appropriate documentation to record the transaction • Contacting supervisor for advice and guidance, where required • Recording the process, as appropriate, on the point of sale register/terminal. *Create and maintain efficient service levels* may include: • Processing transactions quickly but not at the expense of acceptable customer service levels • Monitoring the point of sale area to identify and action situations where operational requirements, including cash/change and service-related documents are running short

	• Advising customers of expected delays in processing their transactions, including explaining the cause of the delay and advising the anticipated length of delay • Clear and clean service area where spills have occurred • Monitor and clean the area around the point of sale service area. *Conduct bag searches* may include: • Advising customer of intent to search bag • Complying with host country legislation and enterprise policies in relation to bag searches • Inspecting customer bags without touching contents • Implementing house policy where customer refuses to allow their bag(s) to be searched • Advising security and/or management where an illegal act is suspected or has been detected. *Point of sale documentation* may include: • Advance deposits • Refunds, returns and exchanges • Invoices and receipts • Paperwork related to non-cash transactions, including vouchers, accounts and charges to rooms • Special orders and special requests • Lay-bys • Stock transfers • Discarded or un-useable stock that has been removed from sale • Electronic funds transfer point of sale (EFTPOS) sales and transactions

	• Cash transfers and internal change requisitions • End-of-trade or end-of-shift reconciliations. *Select appropriate wrapping and packaging material* may include: • Matching materials to the product to be wrapped • Ensuring protection of fragile items • Taking into account the costs associated with wrapping and packaging options • Accommodating specific customer requirements, where possible • Providing gift wrapping services, where applicable • Charging customer for nominated wrapping and packaging as appropriate to house policies. *Wrap and pack items* may include: • Ensuring safety of items wrapped and packed • Presenting an appealing final product to the customer • Completing the wrapping and packaging process in a timely manner commensurate with high levels of customer service • Ensuring final packages are secure, not too heavy or over-loaded and able to be carried by the customer or transported by a carrier, as appropriate • Providing special wrapping and packaging services for goods that are to be transported/delivered. *Make arrangements to forward or transfer goods* may include: • Obtaining and recording delivery details • Contacting agents for transportation on behalf of the customer • Obtaining payment for delivery, as appropriate

	• Advising customer in relation to relevant legal issues, including prohibition on the delivery of tobacco and alcohol to minors • Forwarding items to customer pick-up bays or to other areas for collection by delivery service providers • Insuring items prior to transit • Notifying customer when goods have been dispatched • Following up with customers to ensure items have arrived as anticipated • *Reconcile the register/terminal* may include: • Counting the cash drawer • Undertaking register/terminal readings • Determining anticipated takings • Determining actual takings, including consideration of all cash and non-cash transactions • Recording takings details onto the appropriate internal documentation • Investigating discrepancies within designated scope of authority. *Requisition items* may include: • Stock items, where required by house operating policies • Items required to support the operation of the point of sale area, including security devices, documentation, wrapping and packaging materials • Change • Special requests.

	Activate security systems may include: • Turning on security devices • Locking doors, windows and display cabinets • Setting alarms • Conducting physical inspection of the area to ensure no people remain on the premises after lock up. *Internal documentation related to transactions and service* may include: • Vouchers that have been accepted as payment • All documentation to support non-cash transactions • Invoices to support cash payments made from the register/terminal • Signed documentation to support postings to accounts • Cash summary sheets • Takings sheets • Change request forms • Refund, return and exchange documentation. *Issues arising during service session* may relate to: • Disputes with customers • Suspicious persons or events • Instances where equipment or systems malfunctioned or failed to function as required • Instances where service, safety or security levels were compromised • Theft, assaults or emergency situations, including situations where outside assistance or authorities were involved • Suggestions made by customers, including feedback received whether solicited or not.

	Assessment Guide The following skills and knowledge must be assessed as part of this unit: • The enterprise's policies and procedures in regard to cash handling, equipment operation, scopes of authority to make point of sale decisions regarding refunds, returns and exchanges, authorisation to operate point of sale registers/terminals, wrapping and packing of items including their transportation to other sites/customer homes • Knowledge of host country consumer and fair trading legislation in relation to refunds, exchanges and return of goods • Knowledge of industry codes of practice that apply to retail sales within the host enterprise • Principles of customer service including negotiation and dispute resolution skills • Ability to use verbal and non-verbal communication skills with an emphasis on questioning and active listening techniques • Basic literary and numeracy skills to allow reading of labels and price lists and calculation of selling-related figures, such as discounts, extensions and amount of change due • Theft minimisation and stock security techniques. **Linkages To Other Units** • Manage and resolve conflict situations • Promote hospitality products and services • Provide advice to patrons on food and beverage services • Maintain quality customer/guest service • Process a financial transaction for services rendered • Process transactions for purchase of goods and services • Process financial transactions • Promote products and services to customers

	• Process a financial sale transaction
	• Clean public areas, facilities and equipment
	• Establish and maintain a safe and secure workplace
	• Operate basic security equipment
	• Process liquor sales at a bar facility.
	
	Critical Aspects of Assessment
	
	Evidence of the following is essential:
	
	• Understanding of host enterprise policies and procedures in regard to cash handling, equipment operation, scopes of authority to make point of sale decisions regarding refunds, returns and exchanges, authorisation to operate point of sale registers/terminals, wrapping and packing of items including their transportation to other sites/customer homes
	• Demonstrated ability to prepare a nominated point of sale area for operation and open that area ready for business
	• Demonstrated ability to accurately and effectively operate at least five different nominated point of sale pieces of equipment, one of which must be a register/terminal, to process a nominated range of at least six point of sale transactions which must include:
	  ▪ Registering a sale
	  ▪ Giving change
	  ▪ Accepting payment by credit card
	  ▪ Processing a refund
	• Demonstrated ability to conduct a legal and polite bag search on a nominated customer at a point of sale area
	• Demonstrated ability to safely and securely wrap and pack at least four different nominated items, one of which must be gift-wrapped, according to stated customer requirements using a range of designated materials and equipment.

	Context of Assessment Assessment must ensure: • Actual or simulated workplace application of point of sale handling techniques. **Resource Implications** Training and assessment must include the use of real money and non-cash payment options, real registers/terminals, real point of sale equipment, real products, and real or simulated customers and customer contact and sales situations. **Assessment Methods** The following methods may be used to assess competency for this unit: • Observation of practical candidate performance • Role plays • Practical exercises • Inspection of equipment that has been prepared and used • Analysis of audit rolls from registers/terminals to assess accuracy and efficiency of equipment use • Feedback from customers who have been served at point of sale areas • Oral and written questions • Third party reports completed by a supervisor • Project and assignment work. **Key Competencies in this Unit** *Level 1 = competence to undertake tasks effectively* *Level 2 = competence to manage tasks* *Level 3 = competence to use concepts for evaluating*

	Key Competencies	Level	Examples
	Collecting, organising and analysing information	1	Reading manufacturer's instructions and house policies on equipment operation
	Communicating ideas and information	1	Explaining charges to customers
	Planning and organising activities	1	Preparing point of sale equipment and area for operation
	Working with others and in teams	1	Liaising with management and security staff to address security issues
	Using mathematical ideas and techniques	1	Calculating discounts and charges
	Solving problems	1	Resolving errors and over-charges
	Using technology	1	Processing transactions through point of sale registers/terminals; using equipment that is integrated into point of sale registers/terminals