Apply point of sale handling techniques

D2.TCS.CL5.01

Trainer Guide

Australian Aid

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William Angliss Institute

Specialist centre for foods, tourism & hospitality

Apply point of sale handling techniques

D2.TCS.CL5.01

Trainer Guide

Project Base

William Angliss Institute of TAFE
555 La Trobe Street
Melbourne 3000 Victoria
Telephone: (03) 9606 2111
Facsimile: (03) 9670 1330

Acknowledgements

Project Director:	Wayne Crosbie
Project Manager	Jim Irwin
Chief Writer:	Alan Hickman
Subject Writer:	Alan Hickman
Editor:	Jim Irwin
DTP/Production:	Daniel Chee, Mai Vu, Cindy Curran

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Competency Based Training (CBT) and assessment – An introduction for trainers

Competency

Competency refers to the ability to perform particular tasks and duties to the standard of performance expected in the workplace.

Competency requires the application of specified knowledge, skills and attitudes relevant to effective participation, consistently over time and in the workplace environment.

The essential skills and knowledge are either identified separately or combined.

Knowledge identifies what a person needs to know to perform the work in an informed and effective manner.

Skills describe the application of knowledge to situations where understanding is converted into a workplace outcome.

Attitude describes the founding reasons behind the need for certain knowledge or why skills are performed in a specified manner.

Competency covers all aspects of workplace performance and involves:

- Performing individual tasks
- Managing a range of different tasks
- Responding to contingencies or breakdowns
- Dealing with the responsibilities of the workplace
- Working with others.

Unit of competency

Like with any training qualification or program, a range of subject topics are identified that focus on the ability in a certain work area, responsibility or function.

Each manual focuses on a specific unit of competency that applies in the hospitality workplace.

In this manual a unit of competency is identified as a ‘unit’.

Each unit of competency identifies a discrete workplace requirement and includes:

- Knowledge and skills that underpin competency
- Language, literacy and numeracy
- Occupational safety and health requirements.

Each unit of competency must be adhered to in training and assessment to ensure consistency of outcomes.

Element of competency

An element of competency describes the essential outcomes within a unit of competency.

The elements of competency are the basic building blocks of the unit of competency. They describe in terms of outcomes the significant functions and tasks that make up the competency.

In this manual elements of competency are identified as an 'element'.

Performance criteria

Performance criteria indicate the standard of performance that is required to demonstrate achievement within an element of competency. The standards reflect identified industry skill needs.

Performance criteria will be made up of certain specified skills, knowledge and attitudes.

Learning

For the purpose of this manual learning incorporates two key activities:

- Training
- Assessment.

Both of these activities will be discussed in detail in this introduction.

Today training and assessment can be delivered in a variety of ways. It may be provided to participants:

- On-the-job – in the workplace
- Off-the-job – at an educational institution or dedicated training environment
- As a combination of these two options.

No longer is it necessary for learners to be absent from the workplace for long periods of time in order to obtain recognised and accredited qualifications.

Learning approaches

This manual will identify two avenues to facilitate learning:

<u>Competency Based Training (CBT)</u>

This is the strategy of developing a participant's competency.

Educational institutions utilise a range of training strategies to ensure that participants are able to gain the knowledge and skills required for successful:

- Completion of the training program or qualification
- Implementation in the workplace.

The strategies selected should be chosen based on suitability and the learning styles of participants.

Competency Based Assessment (CBA)

This is the strategy of assessing competency of a participant.

Educational institutions utilise a range of assessment strategies to ensure that participants are assessed in a manner that demonstrates validity, fairness, reliability, flexibility and fairness of assessment processes.

Flexibility in learning

It is important to note that flexibility in training and assessment strategies is required to meet the needs of participants who may have learning difficulties. The strategies used will vary, taking into account the needs of individual participants with learning difficulties. However they will be applied in a manner which does not discriminate against the participant or the participant body as a whole.

Catering for participant diversity

Participants have diverse backgrounds, needs and interests. When planning training and assessment activities to cater for individual differences, trainers and assessors should:

- Consider individuals' experiences, learning styles and interests
- Develop questions and activities that are aimed at different levels of ability
- Modify the expectations for some participants
- Provide opportunities for a variety of forms of participation, such as individual, pair and small group activities
- Assess participants based on individual progress and outcomes.

The diversity among participants also provides a good reason for building up a learning community in which participants support each other's learning.

Participant centred learning

This involves taking into account structuring training and assessment that:

- *Builds on strengths* – Training environments need to demonstrate the many positive features of local participants (such as the attribution of academic success to effort, and the social nature of achievement motivation) and of their trainers (such as a strong emphasis on subject disciplines and moral responsibility). These strengths and uniqueness of local participants and trainers should be acknowledged and treasured
- *Acknowledges prior knowledge and experience* – The learning activities should be planned with participants' prior knowledge and experience in mind
- *Understands learning objectives* – Each learning activity should have clear learning objectives and participants should be informed of them at the outset. Trainers should also be clear about the purpose of assignments and explain their significance to participants
- *Teaches for understanding* – The pedagogies chosen should aim at enabling participants to act and think flexibly with what they know
- *Teaches for independent learning* – Generic skills and reflection should be nurtured through learning activities in appropriate contexts of the curriculum. Participants should be encouraged to take responsibility for their own learning

- *Enhances motivation* – Learning is most effective when participants are motivated. Various strategies should be used to arouse the interest of participants
- *Makes effective use of resources* – A variety of teaching resources can be employed as tools for learning
- *Maximises engagement* – In conducting learning activities, it is important for the minds of participants to be actively engaged
- *Aligns assessment with learning and teaching* – Feedback and assessment should be an integral part of learning and teaching
- *Caters for learner diversity* – Trainers should be aware that participants have different characteristics and strengths and try to nurture these rather than impose a standard set of expectations.

Active learning

The goal of nurturing independent learning in participants does not imply that they always have to work in isolation or solely in a classroom. On the contrary, the construction of knowledge in tourism and hospitality studies can often best be carried out in collaboration with others in the field. Sharing experiences, insights and views on issues of common concern, and working together to collect information through conducting investigative studies in the field (active learning) can contribute a lot to their eventual success.

Active learning has an important part to play in fostering a sense of community in the class. First, to operate successfully, a learning community requires an ethos of acceptance and a sense of trust among participants, and between them and their trainers. Trainers can help to foster acceptance and trust through encouragement and personal example, and by allowing participants to take risks as they explore and articulate their views, however immature these may appear to be. Participants also come to realise that their classmates (and their trainers) are partners in learning and solving.

Trainers can also encourage cooperative learning by designing appropriate group learning tasks, which include, for example, collecting background information, conducting small-scale surveys, or producing media presentations on certain issues and themes. Participants need to be reminded that, while they should work towards successful completion of the field tasks, developing positive peer relationships in the process is an important objective of all group work.

Competency Based Training (CBT)

Principle of Competency Based Training

Competency based training is aimed at developing the knowledge, skills and attitudes of participants, through a variety of training tools.

Training strategies

The aims of this curriculum are to enable participants to:

- Undertake a variety of subject courses that are relevant to industry in the current environment
- Learn current industry skills, information and trends relevant to industry
- Learn through a range of practical and theoretical approaches
- Be able to identify, explore and solve issues in a productive manner

- Be able to become confident, equipped and flexible managers of the future
- Be 'job ready' and a valuable employee in the industry upon graduation of any qualification level.

To ensure participants are able to gain the knowledge and skills required to meet competency in each unit of competency in the qualification, a range of training delivery modes are used.

Types of training

In choosing learning and teaching strategies, trainers should take into account the practical, complex and multi-disciplinary nature of the subject area, as well as their participant's prior knowledge, learning styles and abilities.

Training outcomes can be attained by utilising one or more delivery methods:

Lecture/tutorial

This is a common method of training involving transfer of information from the trainer to the participants. It is an effective approach to introduce new concepts or information to the learners and also to build upon the existing knowledge. The listener is expected to reflect on the subject and seek clarifications on the doubts.

Demonstration

Demonstration is a very effective training method that involves a trainer showing a participant how to perform a task or activity. Through a visual demonstration, trainers may also explain reasoning behind certain actions or provide supplementary information to help facilitate understanding.

Group discussions

Brainstorming in which all the members in a group express their ideas, views and opinions on a given topic. It is a free flow and exchange of knowledge among the participants and the trainer. The discussion is carried out by the group on the basis of their own experience, perceptions and values. This will facilitate acquiring new knowledge. When everybody is expected to participate in the group discussion, even the introverted persons will also get stimulated and try to articulate their feelings.

The ideas that emerge in the discussions should be noted down and presentations are to be made by the groups. Sometimes consensus needs to be arrived at on a given topic. Group discussions are to be held under the moderation of a leader guided by the trainer. Group discussion technique triggers thinking process, encourages interactions and enhances communication skills.

Role play

This is a common and very effective method of bringing into the classroom real life situations, which may not otherwise be possible. Participants are made to enact a particular role so as to give a real feel of the roles they may be called upon to play. This enables participants to understand the behaviour of others as well as their own emotions and feelings. The instructor must brief the role players on what is expected of them. The role player may either be given a ready-made script, which they can memorize and enact, or they may be required to develop their own scripts around a given situation. This technique is extremely useful in understanding creative selling techniques and human relations. It can be entertaining and energizing and it helps the reserved and less literate to express their feelings.

Simulation games

When trainees need to become aware of something that they have not been conscious of, simulations can be a useful mechanism. Simulation games are a method based on "here and now" experience shared by all the participants. The games focus on the participation of the trainees and their willingness to share their ideas with others. A "near real life" situation is created providing an opportunity to which they apply themselves by adopting certain behaviour. They then experience the impact of their behaviour on the situation. It is carried out to generate responses and reactions based on the real feelings of the participants, which are subsequently analysed by the trainer.

While use of simulation games can result in very effective learning, it needs considerable trainer competence to analyse the situations.

Individual /group exercises

Exercises are often introduced to find out how much the participant has assimilated. This method involves imparting instructions to participants on a particular subject through use of written exercises. In the group exercises, the entire class is divided into small groups, and members are asked to collaborate to arrive at a consensus or solution to a problem.

Case study

This is a training method that enables the trainer and the participant to experience a real life situation. It may be on account of events in the past or situations in the present, in which there may be one or more problems to be solved and decisions to be taken. The basic objective of a case study is to help participants diagnose, analyse and/or solve a particular problem and to make them internalize the critical inputs delivered in the training. Questions are generally given at the end of the case study to direct the participants and to stimulate their thinking towards possible solutions. Studies may be presented in written or verbal form.

Field visit

This involves a carefully planned visit or tour to a place of learning or interest. The idea is to give first-hand knowledge by personal observation of field situations, and to relate theory with practice. The emphasis is on observing, exploring, asking questions and understanding. The trainer should remember to brief the participants about what they should observe and about the customs and norms that need to be respected.

Group presentation

The participants are asked to work in groups and produce the results and findings of their group work to the members of another sub-group. By this method participants get a good picture of each other's views and perceptions on the topic and they are able to compare them with their own point of view. The pooling and sharing of findings enriches the discussion and learning process.

Practice sessions

This method is of paramount importance for skills training. Participants are provided with an opportunity to practice in a controlled situation what they have learnt. It could be real life or through a make-believe situation.

Games

This is a group process and includes those methods that involve usually fun-based activity, aimed at conveying feelings and experiences, which are everyday in nature, and applying them within the game being played. A game has set rules and regulations, and may or may not include a competitive element. After the game is played, it is essential that the participants be debriefed and their lessons and experiences consolidated by the trainer.

Research

Trainers may require learners to undertake research activities, including online research, to gather information or further understanding about a specific subject area.

Competency Based Assessment (CBA)

Principle of Competency Based Assessment

Competency based assessment is aimed at compiling a list of evidence that shows that a person is competent in a particular unit of competency.

Competencies are gained through a multitude of ways including:

- Training and development programs
- Formal education
- Life experience
- Apprenticeships
- On-the-job experience
- Self-help programs.

All of these together contribute to job competence in a person. Ultimately, assessors and participants work together, through the 'collection of evidence' in determining overall competence.

This evidence can be collected:

- Using different formats
- Using different people
- Collected over a period of time.

The assessor who is ideally someone with considerable experience in the area being assessed, reviews the evidence and verifies the person as being competent or not.

Flexibility in assessment

Whilst allocated assessment tools have been identified for this subject, all attempts are made to determine competency and suitable alternate assessment tools may be used, according to the requirements of the participant.

The assessment needs to be equitable for all participants, taking into account their cultural and linguistic needs.

Competency must be proven regardless of:

- Language
- Delivery Method
- Assessment Method.

Assessment objectives

The assessment tools used for subjects are designed to determine competency against the ‘elements of competency’ and their associated ‘performance criteria’.

The assessment tools are used to identify sufficient:

a) Knowledge, including underpinning knowledge

b) Skills

c) Attitudes

Assessment tools are activities that trainees are required to undertake to prove participant competency in this subject.

All assessments must be completed satisfactorily for participants to obtain competence in this subject. There are no exceptions to this requirement, however, it is possible that in some cases several assessment items may be combined and assessed together.

Types of assessment

Allocated Assessment Tools

There are a number of assessment tools that are used to determine competency in this subject:

- Work projects
- Written questions
- Oral questions
- Third Party Report
- Observation Checklist.

Instructions on how assessors should conduct these assessment methods are explained in the Assessment Manuals.

Alternative assessment tools

Whilst this subject has identified assessment tools, as indicated above, this does not restrict the assessor from using different assessment methods to measure the competency of a participant.

Evidence is simply proof that the assessor gathers to show participants can actually do what they are required to do.

Whilst there is a distinct requirement for participants to demonstrate competency, there are many and diverse sources of evidence available to the assessor.

Ongoing performance at work, as verified by a supervisor or physical evidence, can count towards assessment. Additionally, the assessor can talk to customers or work colleagues to gather evidence about performance.

A range of assessment methods to assess competency include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals: slides, audio tapes
- Case studies
- Log books
- Projects
- Role plays
- Group projects
- Group discussions
- Examinations.

Recognition of Prior Learning

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

Also known as a Skills Recognition Audit (SRA), this process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Assessing competency

As mentioned, assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency. Traditionally in education, grades or marks were given to participants, dependent on how many questions the participant successfully answered in an assessment tool.

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- Pass Competent (PC)
- Not Yet Competent (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Competency standard

<table>
<tr><td>UNIT TITLE: APPLY POINT OF SALE HANDLING TECHNIQUES</td><td>NOMINAL HOURS: 30</td></tr>
<tr><td colspan="2">UNIT NUMBER: D2.TCS.CL5.01</td></tr>
<tr><td colspan="2">UNIT DESCRIPTOR: This unit deals with skills and knowledge required to operate point of sale equipment and provide related customer services.</td></tr>
<tr><td>ELEMENTS AND PERFORMANCE CRITERIA</td><td>UNIT VARIABLE AND ASSESSMENT GUIDE</td></tr>
<tr><td>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</td><td>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
• Weighing machines
• Internal communication systems</td></tr>
</table>

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	• 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 • Turning on service light • Inviting customers to the sales processing area.

Element 5: Close the point of sale area **5.1** Close and *reconcile the register/terminal* **5.2** Shut down point of sale equipment **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*	*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*

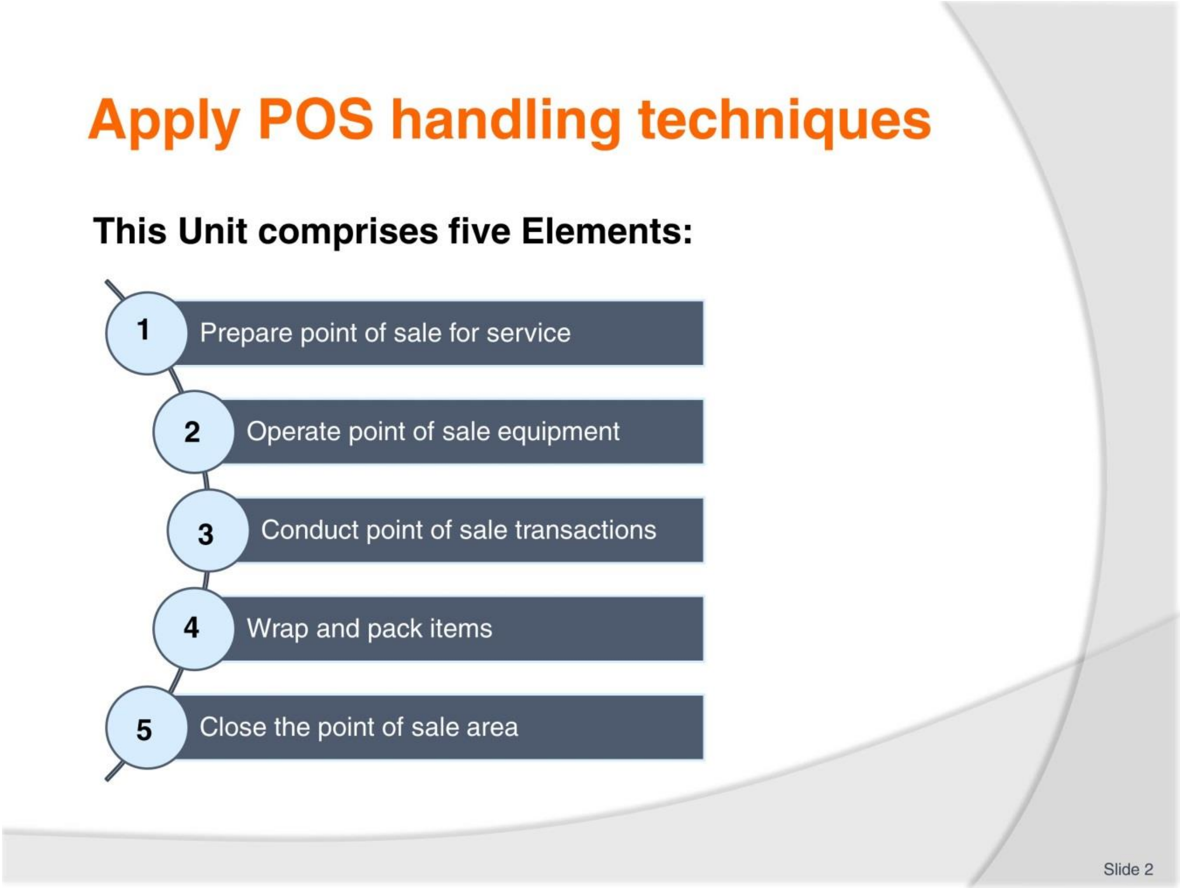
Key Competencies	**Level**	**Examples**
Collecting, organising and analysing information	1	Reading manufacturer's instructions and house policies on equipment operation
Communicating ideas and information	1	Explaining charges to customers
Planning and organising activities	1	Preparing point of sale equipment 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

Notes and PowerPoint slides

Slide

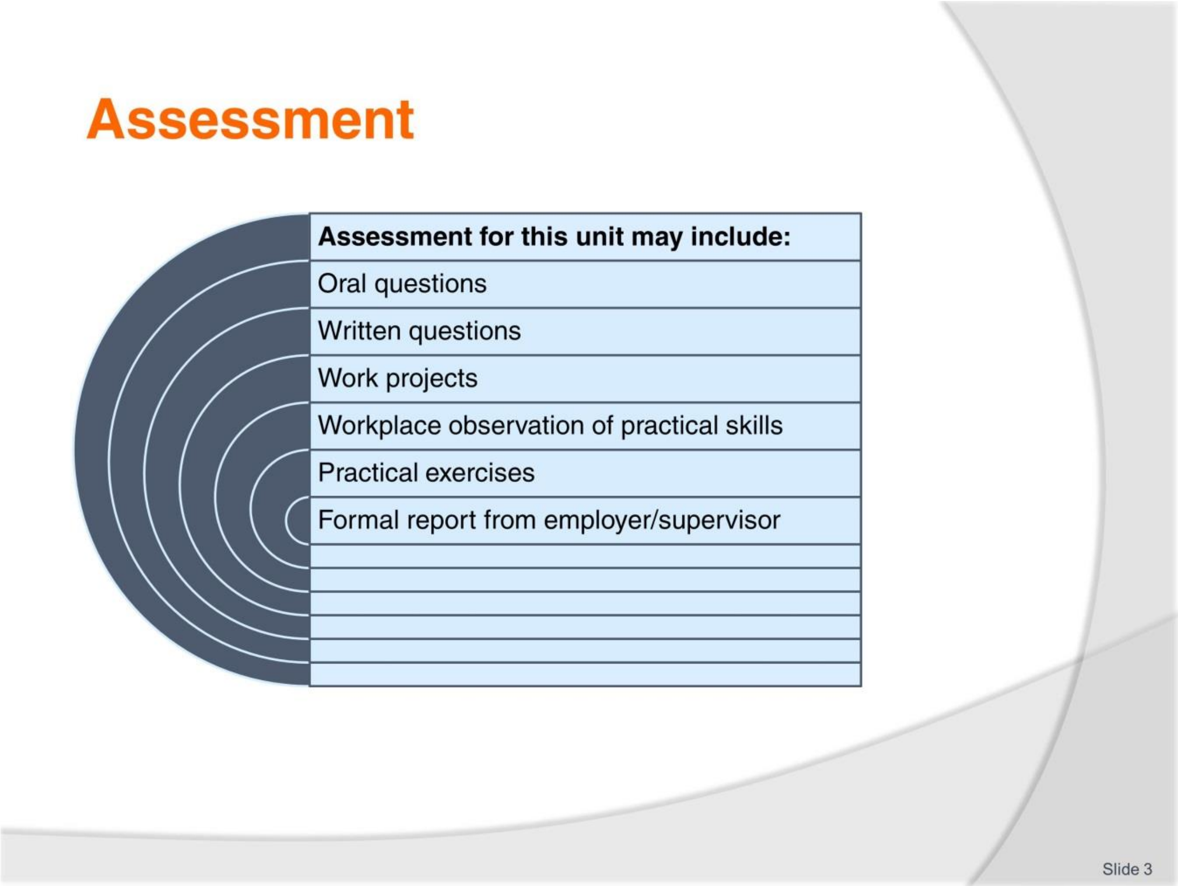
Slide No	Trainer Notes
1.	Trainer welcomes students to class.

Slide



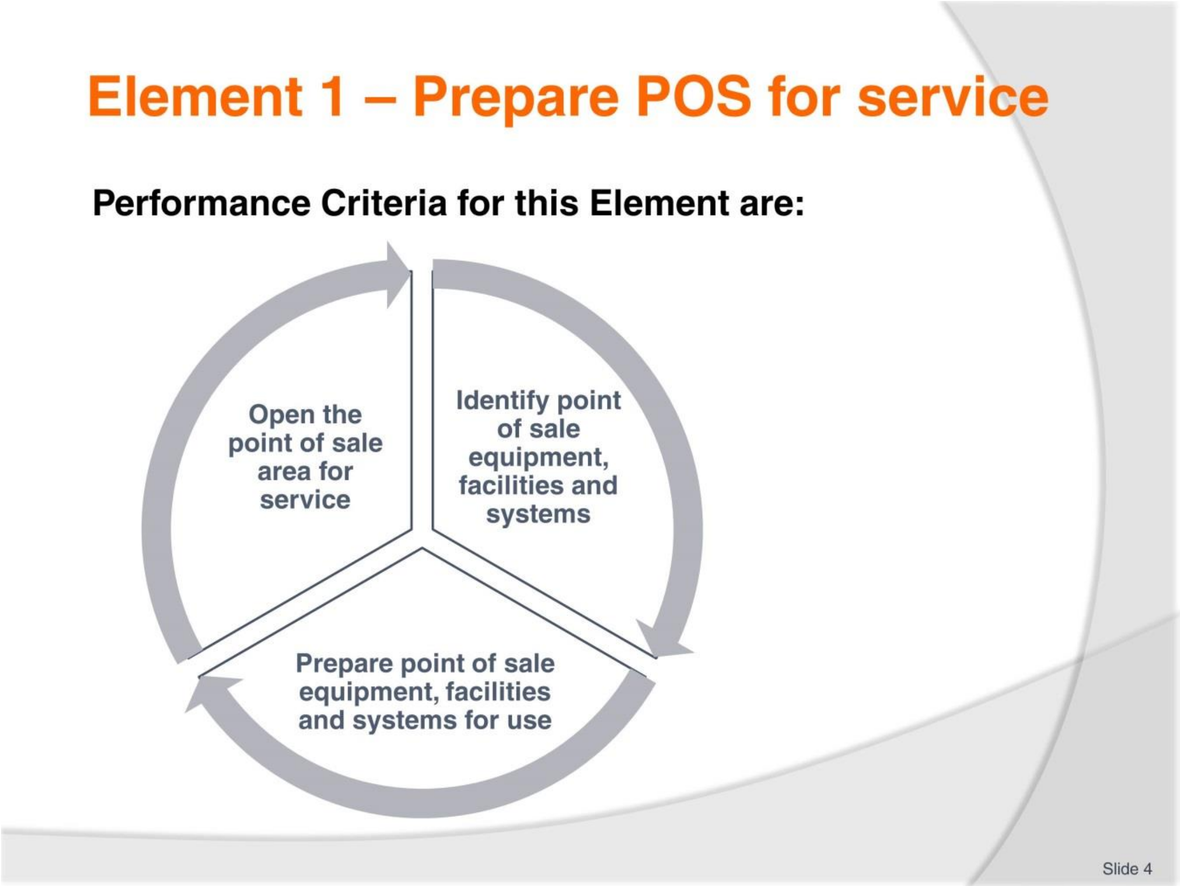
Slide No	Trainer Notes
2.	Trainer advises trainees this Unit comprises five Elements, as listed on the slide explaining: • Each Element comprises a number of Performance Criteria which will be identified throughout the class and explained in detail • Trainees can obtain more detail from their Trainee Manual • At times the course presents advice and information about various protocols but where their workplace requirements differ to what is presented, the workplace practices and standards, as well as policies and procedures must be observed.

Slide



Slide No	Trainer Notes
3.	Trainer advises trainees that assessment for this Unit may take several forms, all of which are aimed at verifying they have achieved competency for the Unit as required. Trainer indicates to trainees the methods of assessment that will be applied to them for this Unit.

Slide



Slide No	Trainer Notes
4.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide. **Class Activity – General Discussion** Trainer leads a general class discussion by asking questions such as: • What is a POS area? • What equipment, systems and facilities might be used/found in a POS area? • What are 'opening procedures'? • Why is it important to prepare POS areas for service?

Slide

Identify point of sale equipment, facilities and systems

It is important to note:

- Different operators/organisations have different equipment, facilities and systems
- Induction and orientation programs are central to the identification process
- The nature and type of the products sold by the operator will be a main determinant
- Most operators will not use all of the items
- Most organisations will provide formal on-the-job training

Slide 5

Slide No	Trainer Notes
5.	Trainer explains it is important to understand: • Different operators/organisations have different equipment, facilities and systems – they are not all the same and, indeed, there can be a wide variation between organisations • Induction and orientation programs are central to the identification process – and will be the main way in which new employees will be made aware of what exists in their workplace • The nature and type of the products sold by the operator will be a main determinant of the POS equipment, facilities and systems which are provided • Most operators will not use all of the items listed below • Most organisations will provide formal on-the-job training to ensure new staff learn how to operate POS equipment, facilities and systems in accordance with manufacturer's instructions and internal protocols.

Slide

Slide No	Trainer Notes

6.	Trainer identifies POS equipment, facilities and systems may include:
	Cash registers
	• These may be known as 'registers', 'tills' and 'POS terminals'
	• They are used process sales and contain money and certain non-cash payment options (cheques, vouchers, card sales)
	• They may be:
	  ▪ Stand-alone units – just a register on its own
	  ▪ Integrated units and systems – linked to scanners, weighing machines and stock control systems
	  ▪ Simple cash drawers.
	Scanners
	• Scanners are used to read bar codes on products
	• Scanners are commonly integrated into POS terminals and automatically register the products and the price.

	Electronic labelling equipment • Electronic labelling equipment is not used in every outlet/organisation • It is equipment which produces price labels and/or bar codes for sticking on products • Price/bar code labelling may include the computer-based creation of in-house bar codes or the use of price markers/labelling guns to produce and attach self-adhesive labels to stock/shelves. **Classroom Activity – Samples** Trainer shows students examples of items identified on slide.

Slide

Slide No	Trainer Notes
7.	Trainer continues identifying POS equipment, facilities and systems: **Electronic funds transfer point of sale (EFTPOS) facilities** • Most operators offer customers the ability to pay for goods and services using an electronic option rather than cash • The name of the system can vary between countries (such as NETS, MEPS) but the principle stays constant in that a machine is required for customers to 'swipe' their card and/or enter a PIN to authorise payment . **Portable data entry equipment** • Some operations may use portable data entry units (or PDETs) which are hand-held items which can moved throughout a workplace to record stock-related data from (for example) shelves and the store room) • The data may be scanned in from bar codes and coupled with data entered by hand • The information is then sent to a central stock-management system to provide the basis for monitoring sales, inventory and the need to order stock. **Internal cash transfer systems** • Large organisations with high cash flow may use an internal cash transfer system • It features a system of tubing using compressed air to move canisters between POS areas and a secure location where cash can be counted and secured.

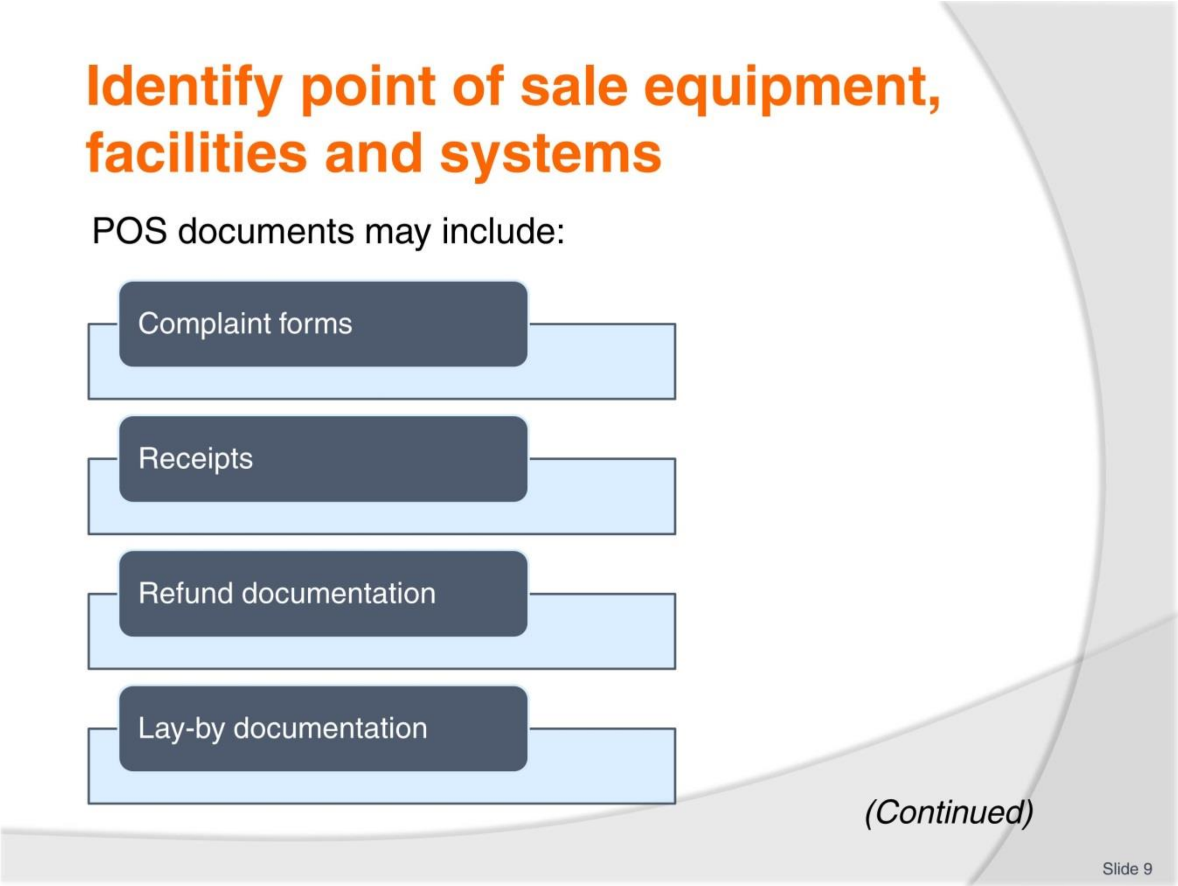
	Classroom Activity – Samples Trainer shows students examples of items identified on slide.

Slide

Slide No	Trainer Notes

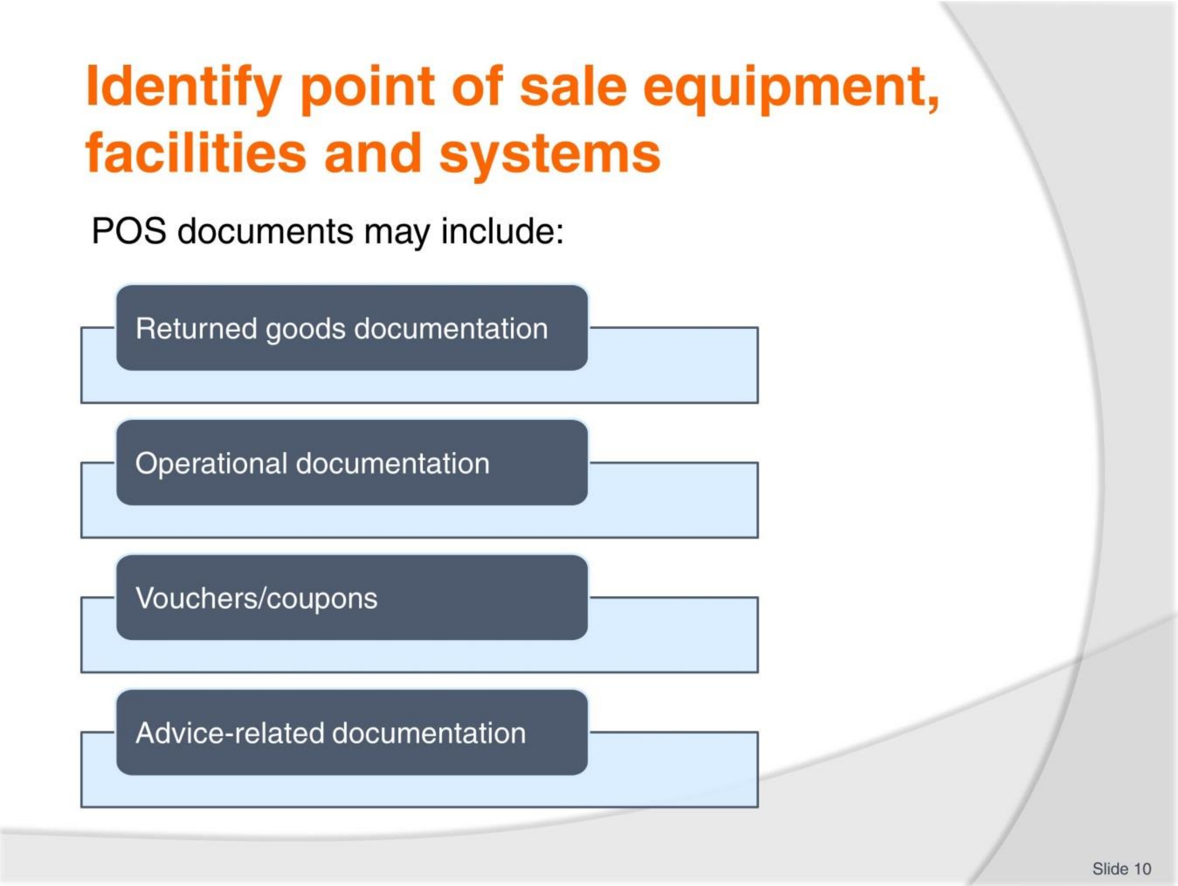
8.	Trainer continues identifying POS equipment, facilities and systems:
	Security systems
	• Security systems may exist for:
	  ▪ Controlling access to rooms/sections of the business – in this case a key, card or code number may be required to gain access to restricted areas
	  ▪ Unauthorised entry (or attempted entry) will usually trigger alarm
	• Standard practice may be the need to de-activate these systems on arrival at the work station, and to activate them as part of closing procedures
	• Limiting access to certain files/levels within a computer system – access in this case commonly requires authorisation from management in the form of a Username and Password.
	Wrapping and packing equipment
	• These items are found at a limited number of outlets and their name indicates exactly what they are used for
	• Mostly, 'wrapping and packing' in the travel and tour industry context simply requires placing customer purchases in to a bag or other container.
	Classroom Activity – Samples
	Trainer shows students examples of items identified on slide.

Slide



Slide No	Trainer Notes
9.	Trainer indicates every business will have a range of documents to support the sales process and the use of equipment, facilities and systems used within the organisation and documentation may include: • Complaint forms – which customers may use to record/lodge complaints about any aspect of the business, products or service • Receipts – to provide evidence of payment by a customer for the item/s or services shown on the document showing amount paid, date paid and often method of payment, time of payment and name of person processing the sale • Refund documentation – to detail money returned to customers as a result of the organisation providing ‘money back’ to them for payments they had made for goods and/or services: ▪ Refunds must only be made: – In accordance with applicable host country legislation – In accordance with the Terms and Conditions of the organisation • Lay-by documentation – some operators may offer a lay-by scheme in place that allows the customer to place a holding deposit on products and have them kept by the business until they are fully paid for. **Classroom Activity – Handouts** Trainer distributes and discusses documents as identified on the slide.

Slide

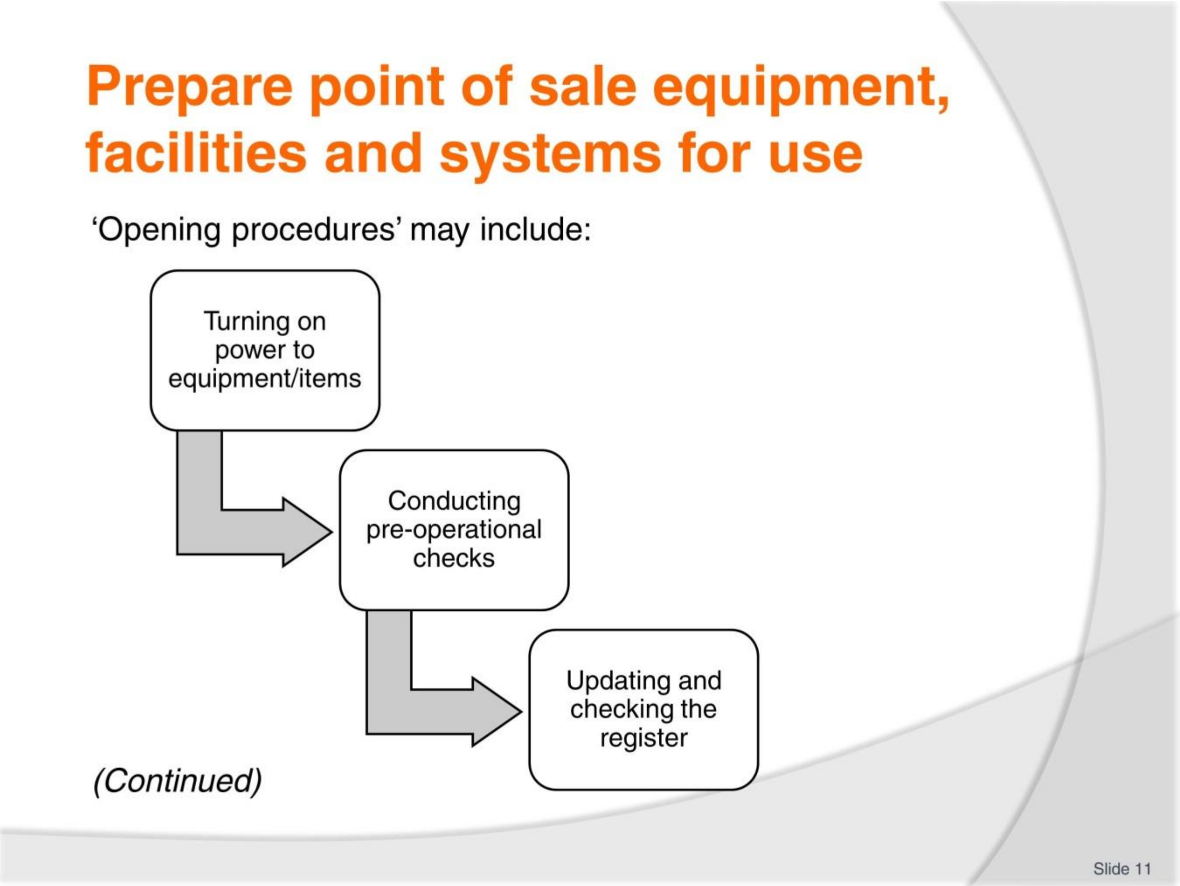


Slide No	Trainer Notes
10.	Trainer continues identifying possible POS documentation:

- Returned goods documentation – these forms are used to process and record goods returned to the business for some reason:
  - Businesses are obliged to accept goods returned if they are defective, if they fail to match their described criteria or if they do not meet the requirements customers stated they needed the item to provide
  - Customers are not legally entitled to a refund if they ‘change their mind about a purchase’ but many organisations allow this as a gesture of goodwill
- Operational documentation – these items can include:
  - Checklists for guiding certain workplace actions and/or inspections
  - Policies and procedures of the business as they relate to sales, selling and operation of the POS area
- Vouchers/coupons – used by customers when they are on a trip/tour to redeem for products/services such as accommodation, meals, merchandise, entry to attractions and a wide range of other items:
  - Some organisations may also make ‘Gift vouchers’ available

	• Advice related documentation forms – most POS areas also feature a range of documentation designed to promote the business and advertise products and services it offers: ▪ These documents may take the form of flyers, leaflets, brochures and a small range of promotional merchandise. **Classroom Activity – Handouts** Trainer distributes and discusses documents as identified on the slide.

Slide



Slide No	Trainer Notes
11.	Trainer explains when preparing POS areas it can be necessary to perform the following tasks ('opening procedures') in relation to the equipment, facilities and systems in the workplace.

Turning on power to electrical units

- There can be a need to turn electrical items on but many pieces of equipment are always left 'on'
- Where they need to be turned on:
  - Use the 'On' button/switch on the item – equipment is commonly left plugged in to the power point and the power point is usually left 'on'
  - Check to ensure:
    - The item has turned on and 'powered up' as required/expected
    - Whether or not there are lights or other indicators there is a problem with the item requiring further attention.

Conducting pre-start operational checks

- Some equipment and systems may require operational checks to be conducted every time they are started

	• If this is the case: ▪ Comply with requirements as explained for each individual item/system in the on-the-job training provided by the organisation ▪ Use/follow checklists provided for individual items ▪ Verify operation of items – perform designated test-run functions to confirm operational readiness of each item/system. **Updating and checking register** • For certain POS registers/terminals there can be a need to: ▪ Change dates ▪ Verify time indication – and correct if required ▪ Input operator identification – to reflect individual user ▪ Log on – using swipe card, code or similar ▪ Replace register/terminal audit roll – if it has run out or is close to running out.

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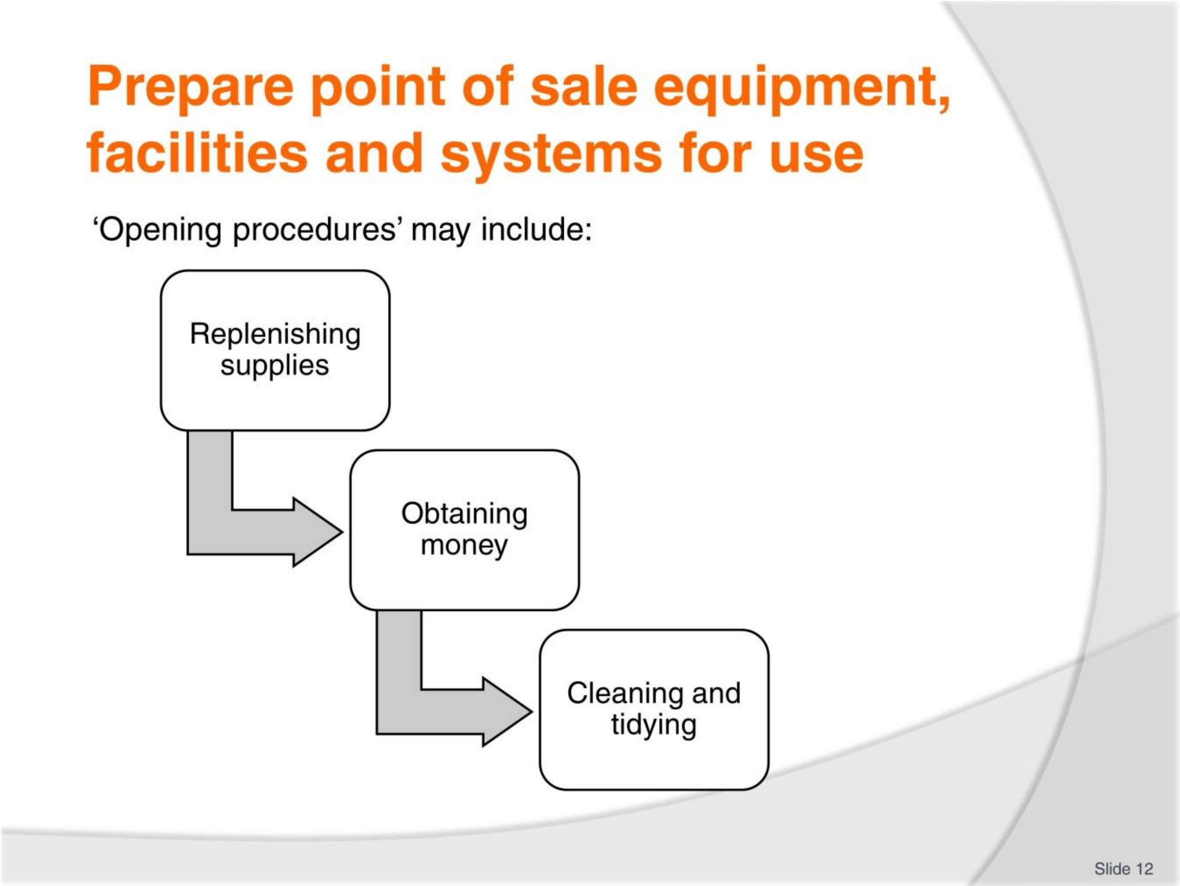
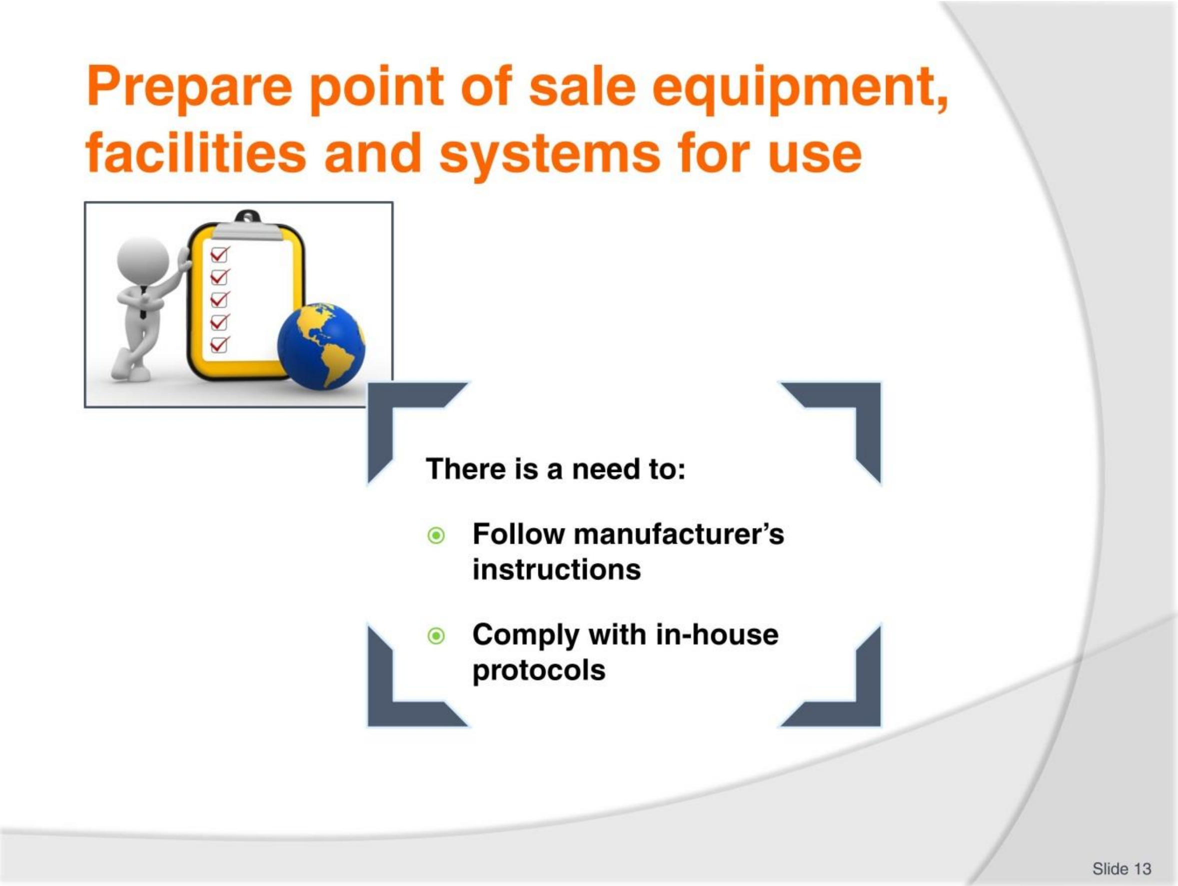


Slide No	Trainer Notes

12.	Trainer continues identifying possible opening procedures:
	Replenishing supplies
	• There is a standing need to replace depleted supplies as required to support point of sale operation
	• This may require:
	  ▪ Completing an internal Requisition form – this may be done at the end-of-trade in some businesses
	  ▪ Asking supervisor/management/owner for required stock
	  ▪ Obtaining required resources from other POS areas – and completing an internal transfer sheet to reflect the fact this stock has been taken from one area for use in another area.
	Obtaining money
	• In some cases:
	  ▪ Management may provide cash to the POS area – as part of the opening procedures
	  ▪ There may be a need to obtain necessary cash – to enable sales transactions to be conducted

	▪ This money may be: – Cash floats – for each register/terminal to enable cash transactions to take place – Change – supplementary cash allowing staff to exchange (for example) large notes for smaller ones, and to replenish coins/notes that have run out as a result of giving change to customers. **Cleaning and tidying** • While many/most organisations will employ dedicated/full-time cleaners to clean the work area there is always a need to: ▪ Check the work station for cleanliness – ensuring: – Behind the counter is clean – Customer-side is clean, tidy and attractive – Tidy the work area – Spot clean equipment, facilities and systems.

Slide



Slide No	Trainer Notes
13.	Trainer highlights need to: ***Follow manufacturer's instructions*** • In all cases the manufacturer's instructions for equipment, facilities and systems must be followed. These: ▪ Will form the basis of on-the-job training when learning how to use items ▪ Will be provided in hard copy form in the work area ▪ Will have been incorporated into SOPs for the work station/POS area • Must be complied with in order to: ▪ Preserve guarantees and warranties ▪ Optimise usable life and performance of the item ▪ Prevent damage. ***Comply with in-house protocols*** • These procedures and requirements may relate to: ▪ Sequence in which equipment, facilities and systems are initiated – there can be a 'required order' (as listed in an 'Opening Checklist') in which items must be turned on

	▪ Time when items/systems are turned on – different items may need to be switched on at different times ▪ Who is authorised to initiate nominated systems – access to certain systems may be restricted to supervisors only who have been given permission by management to do this.

Slide

Open the point of sale area for service

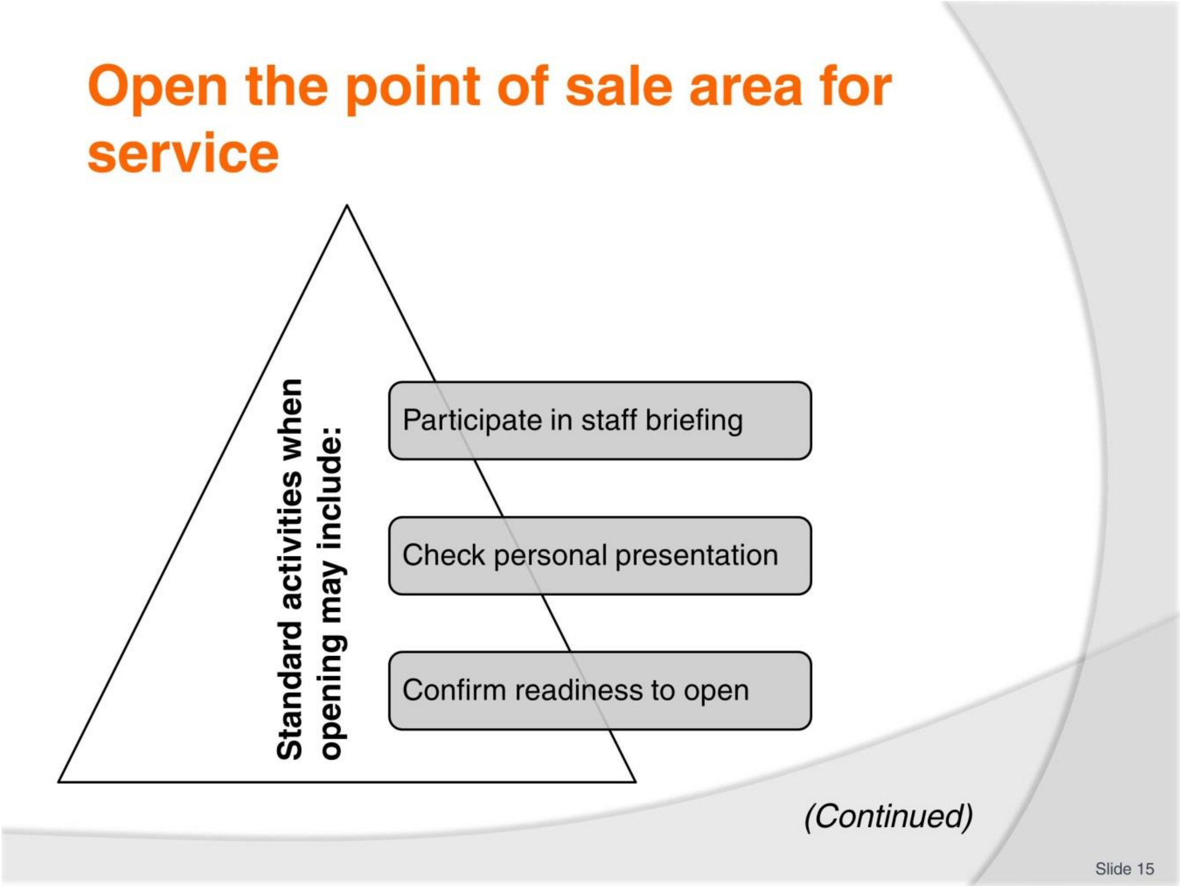
Important to note:

- SOPs of the workplace must be followed
- It is important to adhere the established *sequence* of events
- There can be internal protocols about *who* is allowed to open the POS area
- It is important for the area to open 'on time'

Slide 14

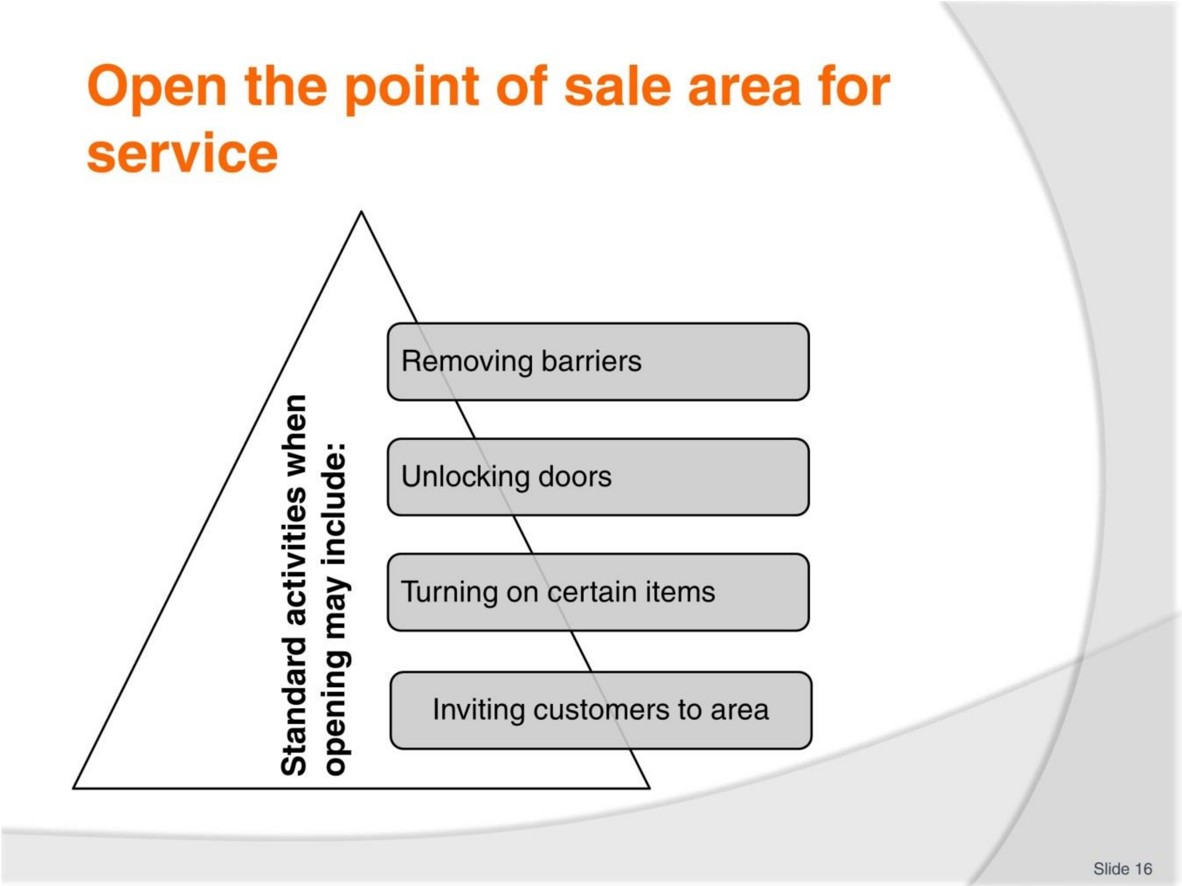
Slide No	Trainer Notes
14.	Trainer highlights when opening it is always important to note: • The standard procedures of the workplace must be followed where they differ from what is presented in the notes – most workplaces have their own way of doing things • It is important to adhere the established sequence of events for opening – there is often a special order in which tasks are to be completed • There can be internal protocols about who is allowed to open the POS area – this duty may be restricted to designated staff only • It is important for the area to open 'on time' – there may be customers waiting and it is important to meet promises made about opening hours/times.

Slide



Slide No	Trainer Notes
15.	Trainer states the usual things which need doing at the start of business can include: • Participating in staff meeting/briefing – to: ▪ Discuss and resolve issues ▪ Determine focus/targets for the session ▪ Share information • Checking: ▪ Personal appearance ▪ Uniform • Confirming readiness to open with supervisor – there may be a need to: ▪ Check with person in-charge if all systems and equipment are fully operational ▪ Obtain permission to proceed and obtain keys ▪ Secure authority to commence processing sales.

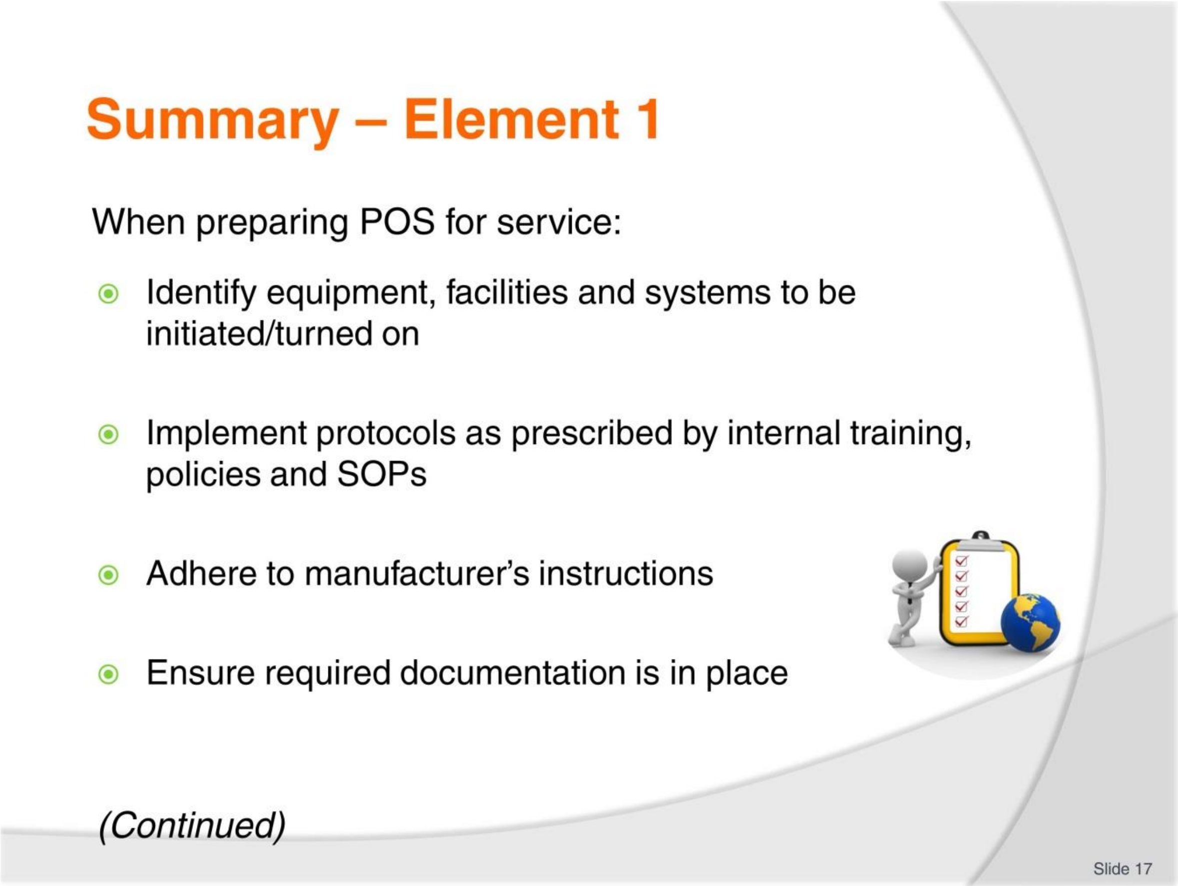
Slide



Slide No	Trainer Notes

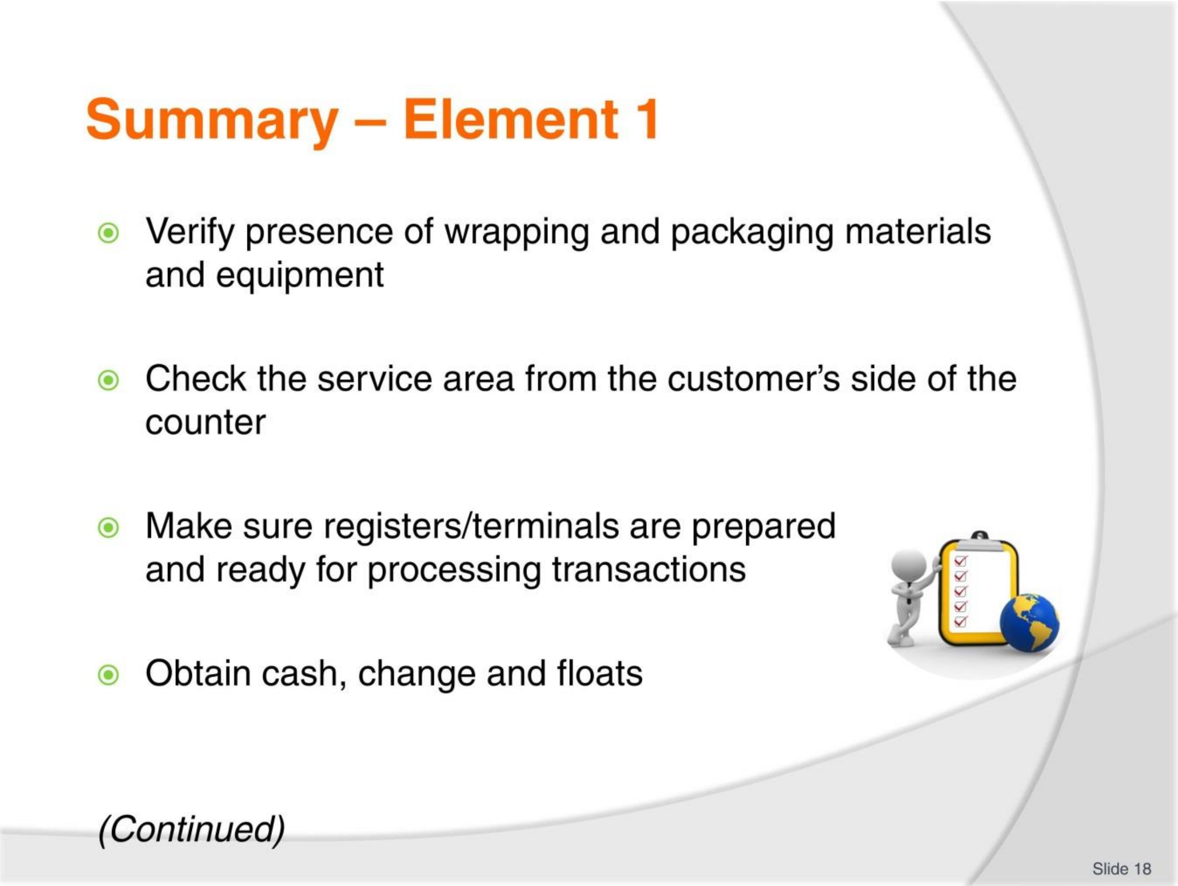
16.	Trainer continues discussing activities in opening the area:
	• Removing and storing barriers – which may have been in place to prevent unauthorised access to the area before the area was ready for trade
	• Unlocking doors – and:
	  ▪ Opening same for any customers who may be waiting to enter
	  ▪ Checking external areas to ensure they are clean/presentable – and cleaning or tidying, as required
	• Turning on various items as required – this may include:
	  ▪ Service light – to indicate to the public that the area/business is 'open for business
	  ▪ Music – pre-setting volume and type of music
	  ▪ Air-conditioning
	• Inviting customers to the sales processing area – if they have been standing outside or have been seated waiting to be served.

Slide



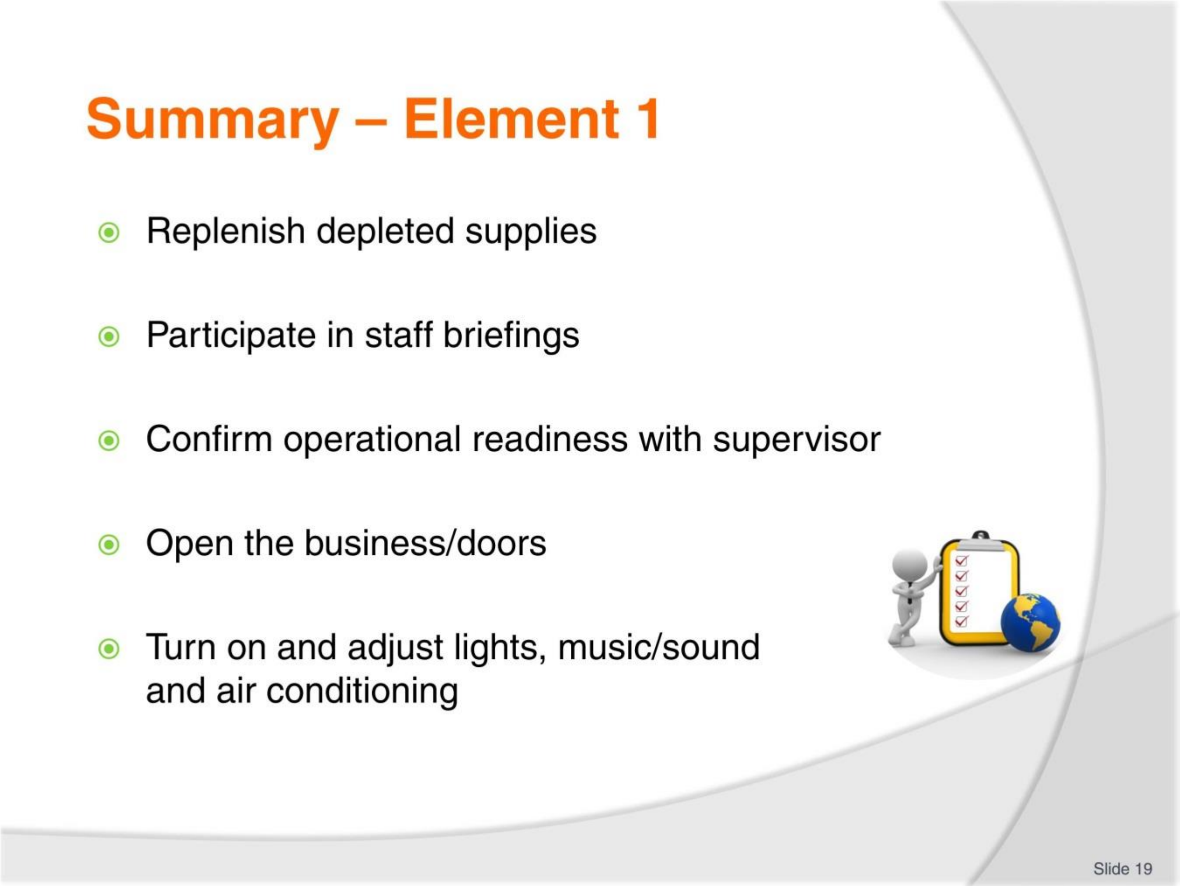
Slide No	Trainer Notes
17.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



Slide No	Trainer Notes
18.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



Slide No	Trainer Notes
19.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Element 2 – Operate POS equipment

Performance Criteria for this Element are:

- Operate point of sale equipment, facilities and system according to manufacturer’s instructions
- Operate point of sale wrapping and packing equipment and use wrapping and packing materials according to manufacturer’s instructions and house policies

Slide 20

Slide No	Trainer Notes
20.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide. **Class Activity – General Discussion** Trainer leads a general class discussion by asking questions such as: • What experience do you have with operating POS equipment/items? • What experience do you have with operating wrapping/packing equipment/items? • What are manufacturer’s instructions?

Slide

Operate point of sale equipment, facilities and system

When operating POS items:

- Manufacturer's instructions must be followed
- Internal protocols have to be followed
- On-the-job training will provide specific skills and knowledge

Slide 21

Slide No	Trainer Notes
21.	Trainer highlights when operating POS area items the following will apply: • Equipment, facilities and systems must always be operated in accordance with manufacturer's instructions' • Internal SOPs must be adhered to • On-the-job training will provide the technical skills needed.

Slide

Operate point of sale equipment, facilities and system

Operating a register/terminal involves:

- Opening register/terminal
- Recording/registering sales
- Perform PLUs for items

(Continued)

Slide 22

Slide No	Trainer Notes
22.	Trainer states keys in operating a POS register/terminal are learning how to: • Open register/terminal – ready for use. This may involve/require: ▪ Counting/checking the float ▪ Using a key to turn the register to designated operating position’ ▪ Flicking a switch to turn the item ‘on’ ▪ Keying in user identification ▪ Checking time and date • Record/register sales – which will vary between types, brands and models of registers and will/may need to embrace the need to: ▪ Enter single and multiple sales ▪ Use scanning facilities to register items ▪ Use alpha-numeric and function keys to process sales • Perform price/product look ups for items – using bar code/scanner and function/alpha-numeric keys. **Classroom Activity – Demonstration and Practical** Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.

Slide

Slide No	Trainer Notes

23.	Trainer continues describing activities in operating a register/terminal:
	• Cancel items – that is, removing (or 'voiding') registered items from 'sale' so the customer is not charged for them
	• Enter 'no sales' – which may be used to open the register when there is a need to (say) check the contents of the cash drawer, or give change to a customer who has not made a purchase
	• Activate the receipt function – in order to provide the buyer with a printed receipt for the transaction/money they have paid:
	  ▪ Some operators insist as SOP that a receipt is issued for every transaction, and some operators only issue a receipt for certain purchases or amounts over a given value
	• Perform item enquiries – also known as a 'Price Inquiry' which provides a limited range of information about products
	• Calculate discounts – these are pre-programmed into the terminal. Discounts:
	  ▪ Must only be given to those who are legitimately entitled to them
	  ▪ Are limited to the amounts entered into the machine/system.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.

Slide

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>24.</td><td>
Trainer continues describing activities in operating a register/terminal:

Enter 'reduced to clear' items – this means programming discounted prices for nominated items into the system/machine so the lower selling price acts as an inducement for customers to make a purchase
Change prices/system to accommodate 'happy hours' – there can be a need to update the system such that selling prices for designated items (or all items) are reduced by a given amount/percentage between certain hours on given days
Process transactions – which may include accepting payment using such as gift vouchers, cheques, cash, credit card/debit card, and EFTPOS
Perform closing functions according to house practice – which may include:

Reading the register/terminal
Counting and balancing the cash and non-cash takings
Reconciliation of takings
Clearing procedures for the register

Lock the register – to secure it at the end of trade.

Classroom Activity – Demonstration and Practical
Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.
</td></tr>
</table>

Slide

Operate point of sale equipment, facilities and system

Generic requirements for operating a scanner:

- Using hand-held and integrated units
- Reading prices from bar codes
- Conducting single and multiple reads

(Continued)

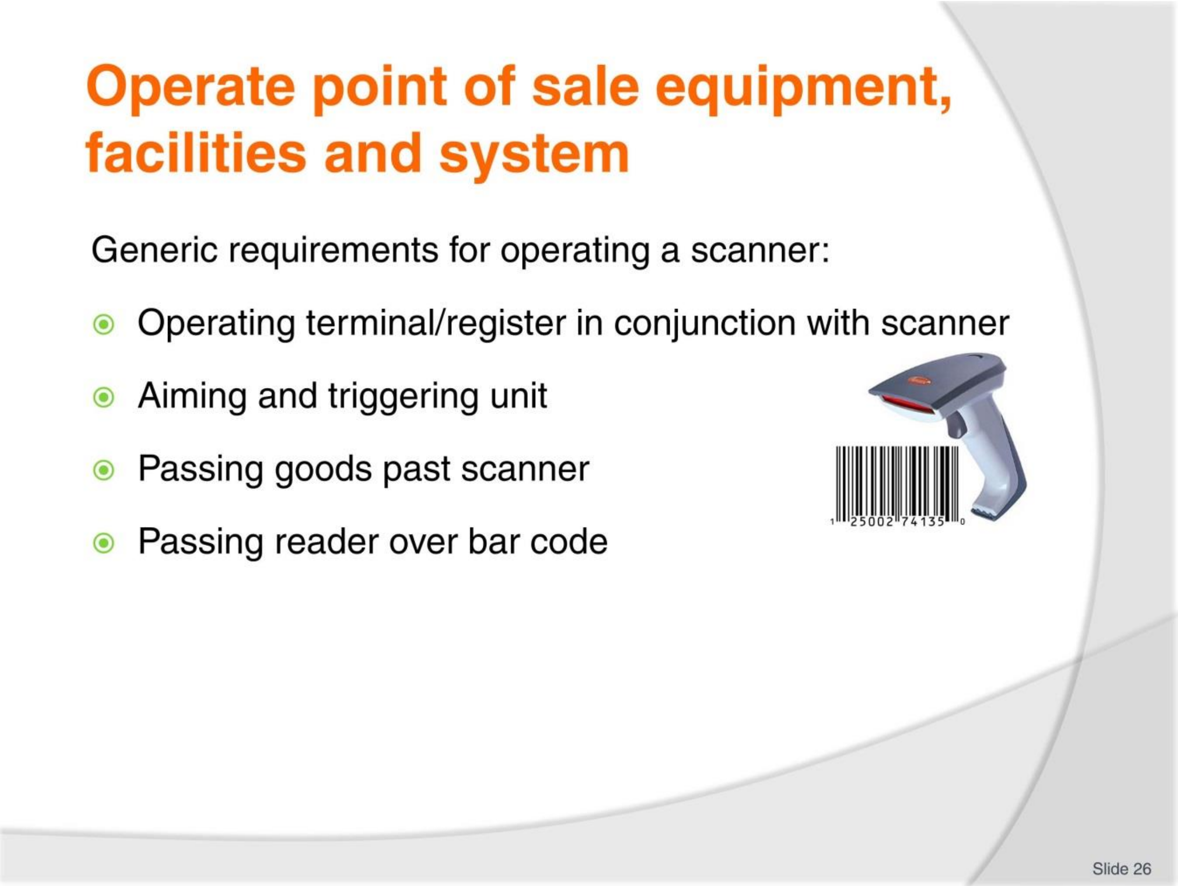
Slide 25

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>25.</td><td>Trainer states generic requirements for operating a scanner will include:

Using hand-held scanners and integrated scanners – to scan items to register their type, price and quantity into the POS register/system
Reading prices from coded items – to assist customers who may wish the selling price of an item that has been bar-codes but does not state an actual selling price
Conducting single and multiple reads – by scanning single and multiple items using hand-held scanners and integrated scanners as appropriate to the system in operation in the workplace.

Classroom Activity – Demonstration and Practical
Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.</td></tr>
</table>

Slide



<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>26.</td><td>Trainer continues stating generic requirements for operating a scanner will include:

Operating the terminal/register in conjunction with scanner operation – so competency is gained in:

Scanning an item
Verifying correct entry of items into the system
Checking correct price is shown and charged
Processing the sale using the register/terminal

Aiming and triggering (where required) a hand-held device – gun, wand or pen
Passing an item past the scanner – vertical, horizontal or omni-directional
Passing the reader over the bar code.

Classroom Activity – Demonstration and Practical
Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.</td></tr>
</table>

Slide

Slide No	Trainer Notes

27.	Trainer discusses operation of electronic labelling equipment stating:
	• Price labelling may include the computer-based creation of in-store bar codes or the use of price markers/labelling guns to produce and attach self-adhesive labels to stock/shelves
	• The computer program for the bar codes will need to be followed precisely in order to generate accurate bar codes for the workplace:
	  ▪ A bar code is really a machine readable code
	  ▪ Alternatively, pre-printed bar code labels can be purchased from commercial suppliers, or supplied from head office
	• While bar coding is extremely popular, there are many stores that still use other labelling methods such as label guns/price markers
	• These allow (usually) one or two lines of information to be generated containing a set number of characters that can be produced onto different shaped and coloured labels/tags including advisory labels such as ‘sell by’: bar codes may also be produced this way
	• Equipment may attach self-adhesive labels or secure the price tag using a plastic tie, or other electronic sensor devices, barbs, hooks or loops
	• Needles are required with some items and care should be taken when using these items.

	Classroom Activity – Demonstration and Practical Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.

Slide

Slide No	Trainer Notes

28.	Trainer discusses using EFTPOS facilities stating this relates to the processing of credit card and debit card sales and emphasising learning how to use these facilities will concentrate on the need to:
	• Adhere to house/floor limits, as applicable – for maximum value of sales
	• Refuse/regret declined transactions – politely and without causing the customer embarrassment
	• Process electronic sales documentation – and:
	  ▪ Presenting copy to purchaser
	  ▪ Retaining copy for internal processing
	• Perform 'cash out' function, where applicable – this is a very limited function and **cash must never be handed to anyone** from a POS register without specific authority from the supervisor regardless of how insistent the person may be and regardless of how compelling/legitimate their case for being given money may seem
	• Perform required security checks – to validate transactions and ensure the card/user are legitimate.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.

Slide

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>29.</td><td>
Trainer discusses basic requirements are:

Initiating equipment – this is turning it ‘on’ and verifying connection to system
Charging the unit – to ensure it has power to operate and/or exchanging batteries/power units
Entering or scanning stock data – according to house policies for transfer to the system, as required into the PDT:
This may also require keying in items counted
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 – to the system
Creating totals – and generating required reports and/or statistics resulting from use of portable data entry equipment
Downloading data – as specified by either the PDT instructions or store protocols.

Classroom Activity – Demonstration and Practical
Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.
</td></tr>
</table>

Slide

Operate point of sale equipment, facilities and system

Using weighing scales ('stand-alone' or 'integrated with register') involves learning how to:

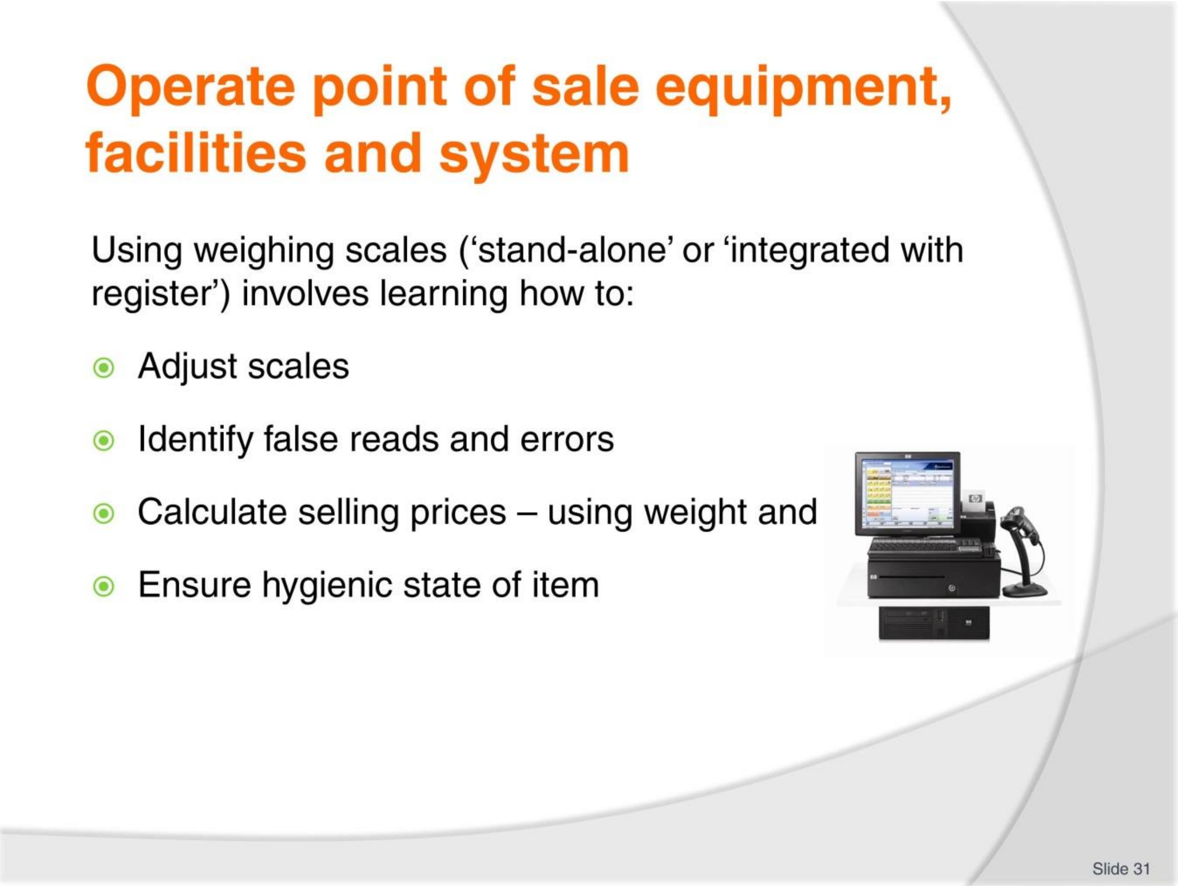
- Clear scale readings
- Set price per unit
- Read scales

(Continued)

Slide 30

Slide No	Trainer Notes
30.	Trainer discusses using weighing scales explaining there is a need to learn how to: • Clear scale readings – so scales can be re-tabulated for different products and selling prices per item by weight • Set price per item – for different items so prices charged reflect current operator requirements • Read scales – in order the: ▪ Weight of the item can be determined ▪ The customer can be informed of the weight ▪ The price for the product can be calculated. **Classroom Activity – Demonstration and Practical** Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.

Slide



Slide No	Trainer Notes

31.	Trainer continues discussing requirements when learning how to use weighing scales:
	• Adjust scales – so:
	  ▪ They are level
	  ▪ They give an accurate reading
	• Identifying false reads and errors – as shown through:
	  ▪ Common sense observation of readings and the weighing process
	  ▪ System indicators
	• Calculating selling prices – using:
	  ▪ Nominated/current selling prices multiplied by unit weight
	  ▪ Applicable discounts for individual customers
	• Ensuring hygienic condition of scales – for food products, which may require:
	  ▪ Spot cleaning
	  ▪ Washing with detergent
	  ▪ Spraying with sanitiser – and allowing required contact time
	  ▪ Wiping.

	Classroom Activity – Demonstration and Practical Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.

Slide

Operate point of sale equipment, facilities and system

Internal communication may require:

- Using pager and/or PA systems – to make public announcements
- Using the telephone system – to:
  - Place/make calls to internal and external numbers
  - Receive and transfer calls
  - Place calls on hold
  - Use system options/facilities

Slide 32

Slide No	Trainer Notes
32.	Trainer explains there may be a need in larger workplaces for POS staff to use internal communication devices and systems:

- Using the pager system and/or PA system to make public announcements – to advise customers about a range of issues such as:
  - Specials
  - Emergencies
  - Service-related calls
- Using internal telephone system – including:
  - Placing outgoing calls to external numbers – where permitted by management/SOPS: many POS staff are not allowed to use the telephone system for making external calls
  - Taking incoming calls – where customers are making product/sales-related queries
  - Making calls to internal individuals and departments – to obtain information and/or assistance
  - Transferring incoming calls – to the person/department who can best assist the caller.

	Classroom Activity – Demonstration and Practical Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.

Slide

Operate point of sale equipment, facilities and system

Using security system/devices may involve:

- Tagging items with security devices
- Removing security tags from stock
- De-activating alarms and devices
- Activating alarms and devices
- Over-riding alerts and alarms

Slide 33

Slide No	Trainer Notes

33.	Trainer introduces security systems and devices observing there can therefore be a need to learn how to use internal equipment to:
	• Tag items with security devices – so they will activate an alarm if taken out of the business without the tag being removed
	• Remove security tags and devices from items:
	  ▪ When a sale occurs
	  ▪ Without triggering the alarm and/or damaging the item of stock from which the tag is removed
	• De-activate security devices and alarms – when required by management for various operational and/or system verification purposes
	• Re-set security devices and systems – after:
	  ▪ Tags have been changed
	  ▪ Alerts/alarms have occurred
	  ▪ System checks/verifications have been completed
	• Over-ride security alerts and alarms – to accommodate situations where the system generates an alert/alarm for a non-valid reason.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates operation of item as described on slide and provides opportunity for students to do the same.

Slide

Slide No	Trainer Notes
34.	Trainer identifies wrapping and packing equipment and materials may include: • Paper wrapping – which may involve: ▪ Paper rollers/counter roll holders ▪ Paper wrapping machines ▪ Single sheets of tissue paper ▪ Sheets of store-branded wrapping paper • Plastic wrapping – which may involve: ▪ Shrink-wrapping facilities ▪ Heat-sealing of items ▪ Rollers and cutters • Hand-held and bench-mounted tape dispensers – for: ▪ Store-labelled tape – featuring the name of the organisation ▪ ‘Fragile’ tape ▪ Normal adhesive tape ▪ Bubble wrap

	• String and twine dispensers: ▪ Glue guns – and hot glue. **Classroom Activity – Demonstration and Practical** Trainer demonstrates how to use items listed on slide and provides opportunity for students to do the same.

Slide

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>35.</td><td>
Trainer continues presenting wrapping and packing requisites:

A wide selection of wrapping materials – such as:

Paper
Bubble wrap
Tissue paper
Plastic film

Gift wrapping items – including ribbons and bows
Styrofoam spacers – used to create a safe/soft surface between layers of packed item
Pre-used cartons, boxes and crates – this option features the re-cycling of boxes/cartons which have brought stock into the business
Built boxes and containers – these are ‘flat pack’ boxes which are constructed on an ‘as needed’ basis in the workplace to house items for transportation.

Classroom Activity – Demonstration and Practical
Trainer demonstrates how to use items listed on slide and provides opportunity for students to do the same.
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Slide

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>36.</td><td>
Trainer continues presenting wrapping and packing requisites:

Bags and pouches – often/usually bearing the name of the business and available in a range of sizes to contain goods of different types and/or quantities:
Bags (paper or plastic) are the most common form of wrapping/packing used
Tubing, hat boxes and suit bags – used for speciality wrapping of certain items
Bottle bags – used to wrap bottled: available in single, double-bottle and other size alternatives
Envelopes and mailers – for sending items by post.

Classroom Activity – Demonstration and Practical
Trainer demonstrates how to use items listed on slide and provides opportunity for students to do the same.
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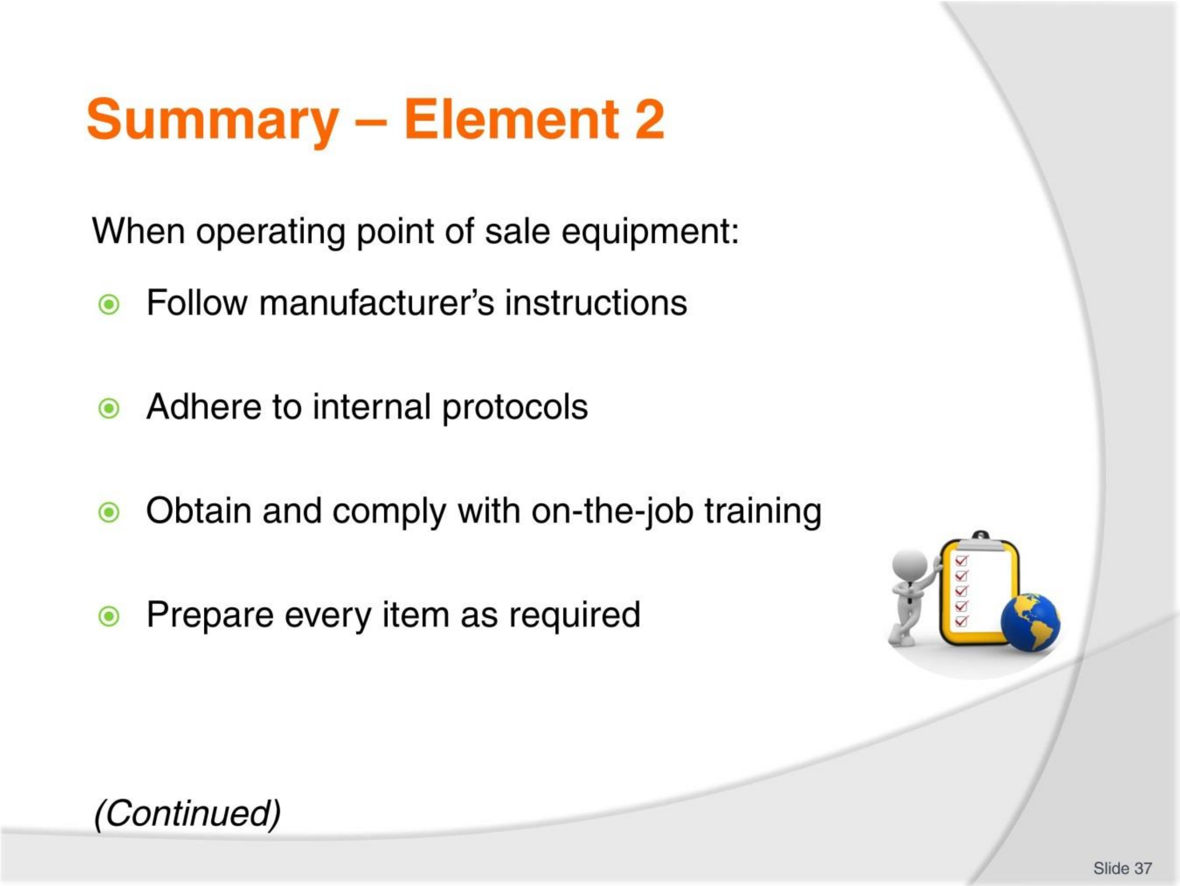
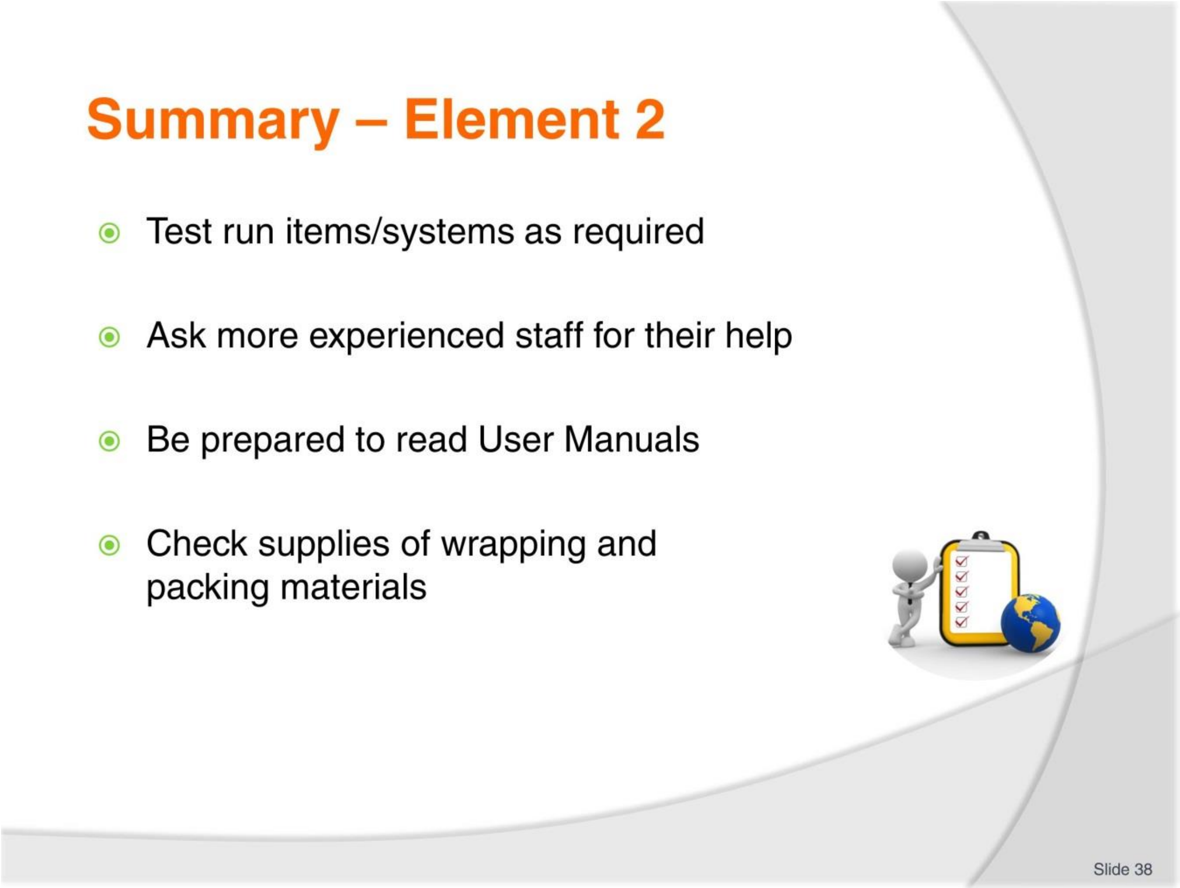


Slide No	Trainer Notes
37.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



Slide No	Trainer Notes
38.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Element 3 – Conduct POS transactions

Performance Criteria for this Element are:

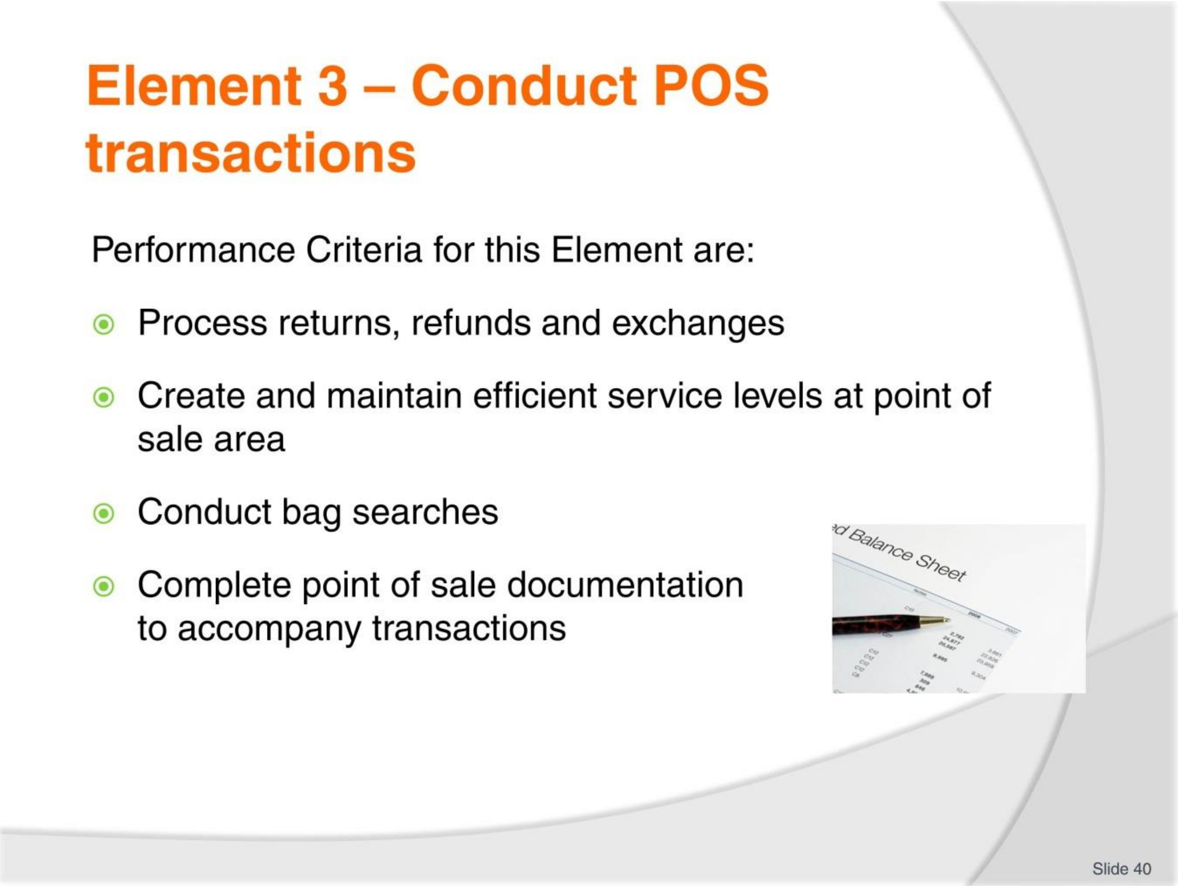
- Process sales in accordance with customer wishes
- Accept payment for goods and services purchased
- Establish rapport with customers during the service
- Optimise sales for each transaction, as appropriate

(Continued)

Slide 39

Slide No	Trainer Notes
39.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide.

Slide



Slide No	Trainer Notes
40.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide. **Class Activity – General Discussion** Trainer leads a general class discussion by asking questions such as: • What are transactions? • Why is proper/correct processing of transactions important? • What are important aspects of this task? • How can POS operators ensure high levels of customer service when conducting POS transactions?

Slide

Process sales in accordance with customer wishes

When processing sales:

- Treat every transaction as unique
- Be polite and courteous
- Ensure honesty and accuracy
- Provide advice and assistance

Slide 41

Slide No	Trainer Notes
41.	Trainer explains important keys when processing sales are to: • Treat each transaction as an individual interaction with a customer • Be polite and courteous • Ensure honesty and accuracy • Provide advice and assistance, where requested or required.

Slide

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>42.</td><td>
Trainer advises processing sales may require the operator to perform activities as follows:

Scan each item the customer wants to purchase – it should be common practice to:

Know the selling prices of the items being scanned
Check the price shown on the register when the item is scanned to ensure correct prices are being levied
Adjust any selling price when it is seen to be incorrect
Help the customer with scanning their items – meaning the operator should be proactive in scanning items as opposed to waiting for the customer to do so/offer items for scanning
Accompany the essentially impersonal action with positive customer relations – such as a smile and/or a brief verbal exchange

Use product look up function – this is an alternative to scanning an item into the register/terminal. Generally PLU keys are used by:

Pressing a designated item button on the register
Keying in the item number (from the barcode) and pressing the PLU button – meaning an item can be registered even where the barcode has been damaged (or the item is too big/bulky to scan)

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	• Refer to hard copy price lists – this can be needed where: ▪ An item is on Special but has not been marked down and/or has not had its sale price altered in the system ▪ The selling price of the item is not known and the item does not carry a price tag or bar code. **Classroom Activity – Demonstration and Practical** Trainer demonstrates how to use perform tasks listed on slide and provides opportunity for students to do the same.

Slide

Process sales in accordance with customer wishes

Processing sales can include/require:

- Reading and interpreting labels
- Identifying product/service to be paid for
- Entering data into register/terminal

(Continued)

Slide 43

Slide No	Trainer Notes
43.	Trainer continues describing tasks involved in processing sales: • Read and interpret labels – this requires an understanding of each section/element of a label – many elements are coded and require the operator to have detailed label-specific knowledge. This ability is necessary in order to, for example: ▪ Ensure items are entered against the correct department/section when selling them ▪ Obtain details about the supplier from whom the item was bought ▪ Access cost price information about the item • Identify product or service to be paid for – this relies heavily on: ▪ Visual recognition of items ▪ Product knowledge ▪ Ability to differentiate between similar services based on component elements of the sale ▪ Reading of tags and codes, and reading of accompanying paperwork provided by sales staff • Enter data into register/terminal – using: ▪ Alpha keys for entering selling price ▪ Item keys

	▪ Tax keys for adding relevant host country tax/es ▪ Department keys – to allocate sales to the correct department ▪ Touch screens. **Classroom Activity – Demonstration and Practical** Trainer demonstrates how to use perform tasks listed on slide and provides opportunity for students to do the same.

Slide

Process sales in accordance with customer wishes

Processing sales can include/require:

- Factoring in allowable discounts
- Determining final selling price of items purchased
- Explaining charges to customer

(Continued)

Slide 44

Slide No	Trainer Notes
44.	Trainer continues describing tasks involved in processing sales: • Factor in allowable discounts – most registers feature a facility enabling discounts to be calculated for customers. Options include: ▪ Discounts applicable to individual items ▪ Discounts applicable to 'Total' price at end of transaction ▪ Variable discounts – for example: – Different discount percentages for different products/services – Different discount percentages for different classifications of customers – Discounts based on quantities purchased • Determine final selling price for items purchased – while some registers/terminals will provide 'real time totals' (a cumulative/running total that changes as items are added/deducted), many do not. Operators must be able to: ▪ Provide customers with an accurate total of money due when all items have been registered ▪ Give customers the sub-total of purchases if requested by the customer

	• Explain charges to customers – this is important to: ▪ Reassure them they have not been over-charged ▪ Clarify instances where they believe they feel they have (for example) been charged twice for the one item ▪ Give details of 'extras' added to purchases – such as levies, taxes, charges, on-costs. **Classroom Activity – Demonstration and Practical** Trainer demonstrates how to use perform tasks listed on slide and provides opportunity for students to do the same.

Slide

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>45.</td><td>
Trainer continues describing tasks involved in processing sales:

Resolve disputes with customers – relating to:

Selling prices shown on goods/documents
Differences between advertised prices and prices charged
Actual prices charged – in terms of, say, damaged goods, value-for-money
Promises made by the business:

Most businesses will have SOPs for dealing with situations where customers have been over-charged – with possible options including:

Verbal apology
Provision of item to customer free-of-charge
Refund of (for example) twice the over-charge amount

Remove items from the transaction as required by customer – this can occur if the customer:

Changes their mind
Has insufficient funds to pay

Re-key/re-process transactional errors – where mistakes have been made with the original data entry.

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	Classroom Activity – Demonstration and Practical Trainer demonstrates how to use perform tasks listed on slide and provides opportunity for students to do the same.

Slide

Accept payment for goods and services purchased

Various methods of payment exist – not all businesses accept all options:

- Cash – of the host country
- Foreign currency
- EFTPOS

(Continued)

Slide 46

Slide No	Trainer Notes

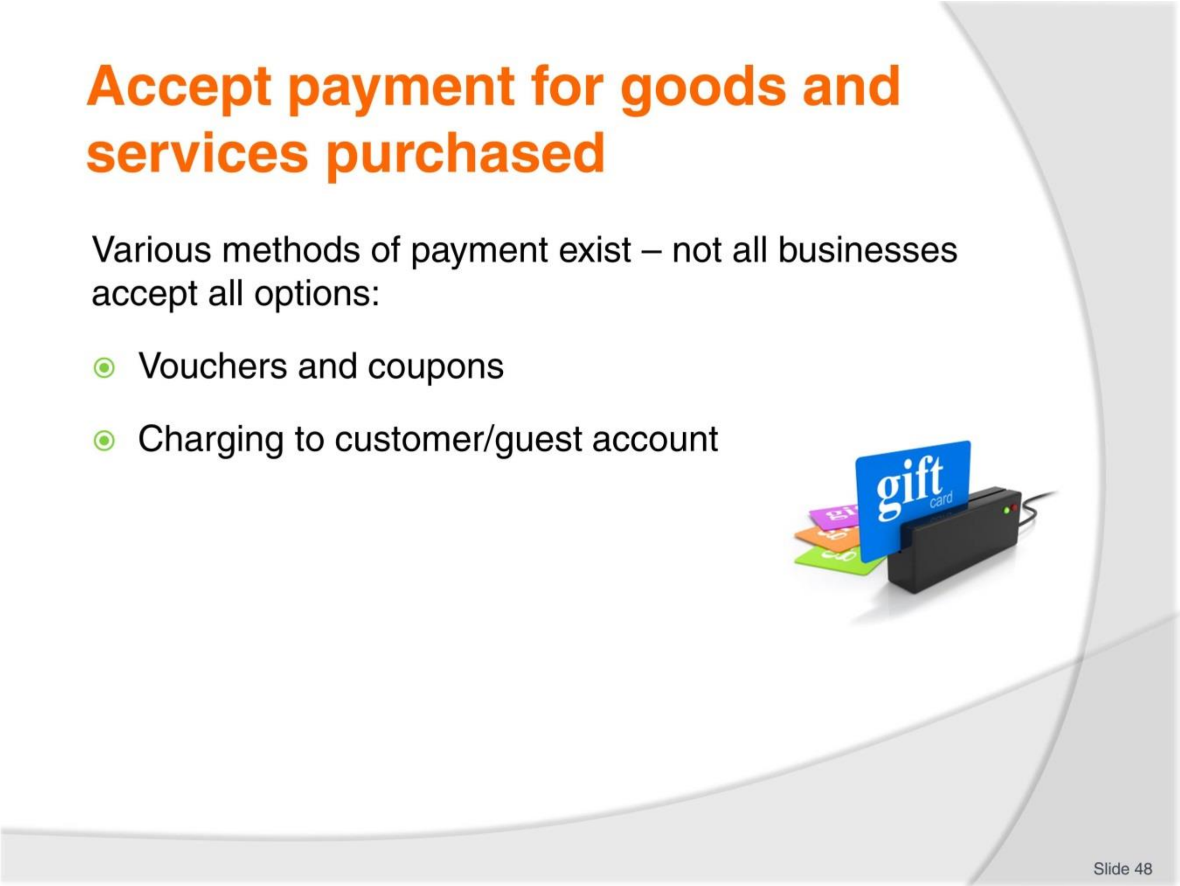
46.	Trainer explains organisations may accept payment in a variety of forms including:
	• Cash – in the currency of the host country
	• Foreign currency – some businesses will accept payment in the currency of another currency. Where this is done:
	  ▪ The business determines the exchange rate which will be offered/given
	  ▪ All change is given in the currency of the host country – and not in the foreign currency
	• Cards/EFTPOS – this refers to situations where customers pay using either debit and/or credit cards:
	  ▪ Not all businesses accept/process all card types so there is a need to check to ensure the form of payment being offered is, in fact, accepted by the organisation
	  ▪ Debit cards involve the customer taking money from their designated/preferred account to pay for items
	  ▪ Credit cards involve the customer charging purchases to a nominated credit account

	▪ Requirements for processing will change depending on the system and items of equipment being used – for example some systems may feature: – Paywave technology – Need for customer to sign a slip – Use of a PIN. **Classroom Activity – Demonstration and Practical** Trainer demonstrates accepting payment from customer in the forms listed on the slide and provides opportunity for students to do the same.

Slide

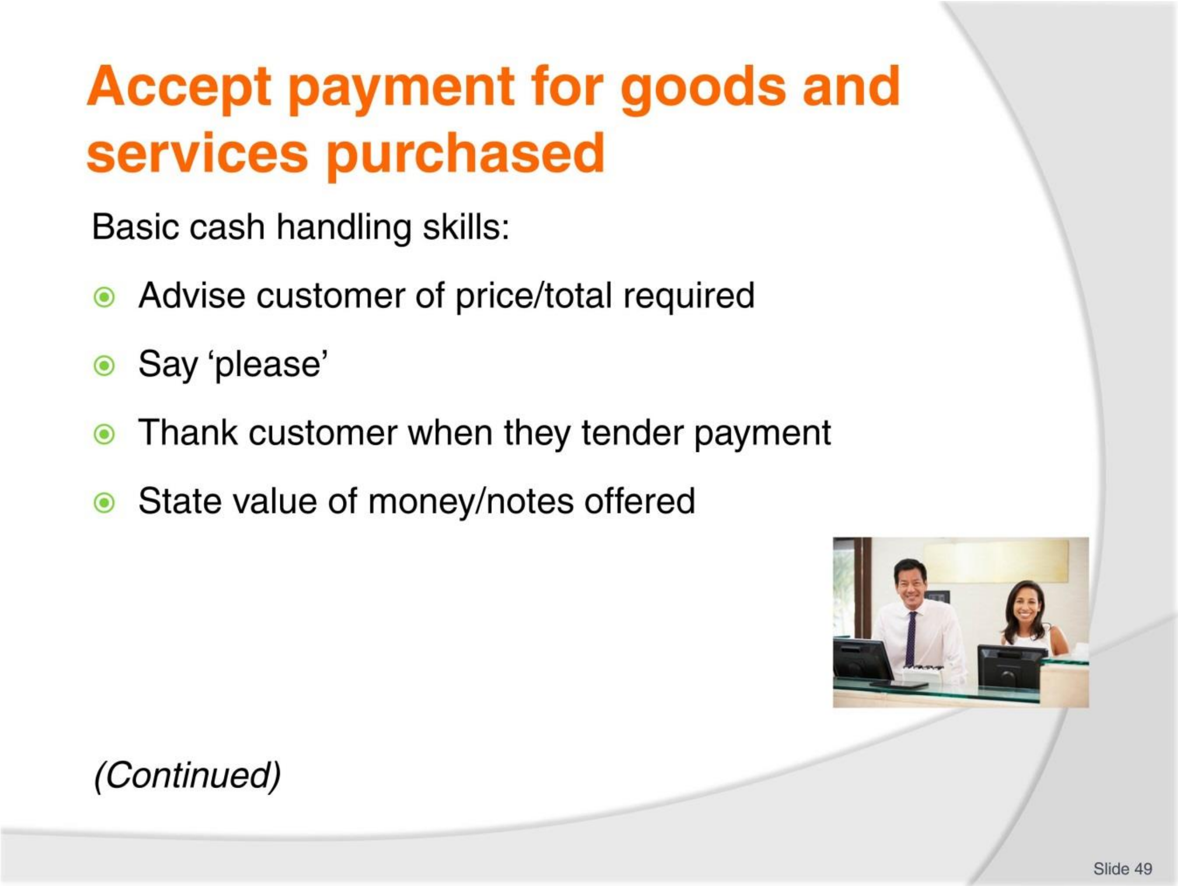
Slide No	Trainer Notes
47.	Trainer continues method of payment options: • Cheques – these may be personal cheques or business cheques. Many businesses: ▪ Will not accept payment by personal or business cheques unless prior arrangements have been made ▪ Will limit the value of goods/services which can be paid for using cheques ▪ Have strict protocols to be applied when accepting payment by cheque • Traveller's cheques – some businesses accept payment in this form and some do not: ▪ When accepting payment in this form: – The signatures must be compared to determine they are the same – The second signature MUST be put on the cheque in front of the cashier – a travellers' cheque with both signatures signed should NEVER be accepted. **Classroom Activity – Demonstration and Practical** Trainer demonstrates accepting payment from customer in the forms listed on the slide and provides opportunity for students to do the same.

Slide



Slide No	Trainer Notes
48.	Trainer continues method of payment options: • Vouchers and coupons – it is possible: ▪ Customers may want to pay using a Gift Card to pay for all/part of their purchase ▪ Customers may want to redeem a travel voucher/coupon for products and/or services: – When processing payment in this form it is important to know: – The goods and services which may be obtained using this method of payment – there is often some form of restriction as to what may be bought using this form of payment – Whether or not customers can add extra cash to make a purchase – Limits which apply to volumes and/or values – Expiry dates which might apply to their use – What happens if there is residual credit after the purchase has been made – some businesses: – Do not allow any credit to be returned to the customer – Issue another card with residual credit – Deduct the value spent leaving whatever residual balance exists

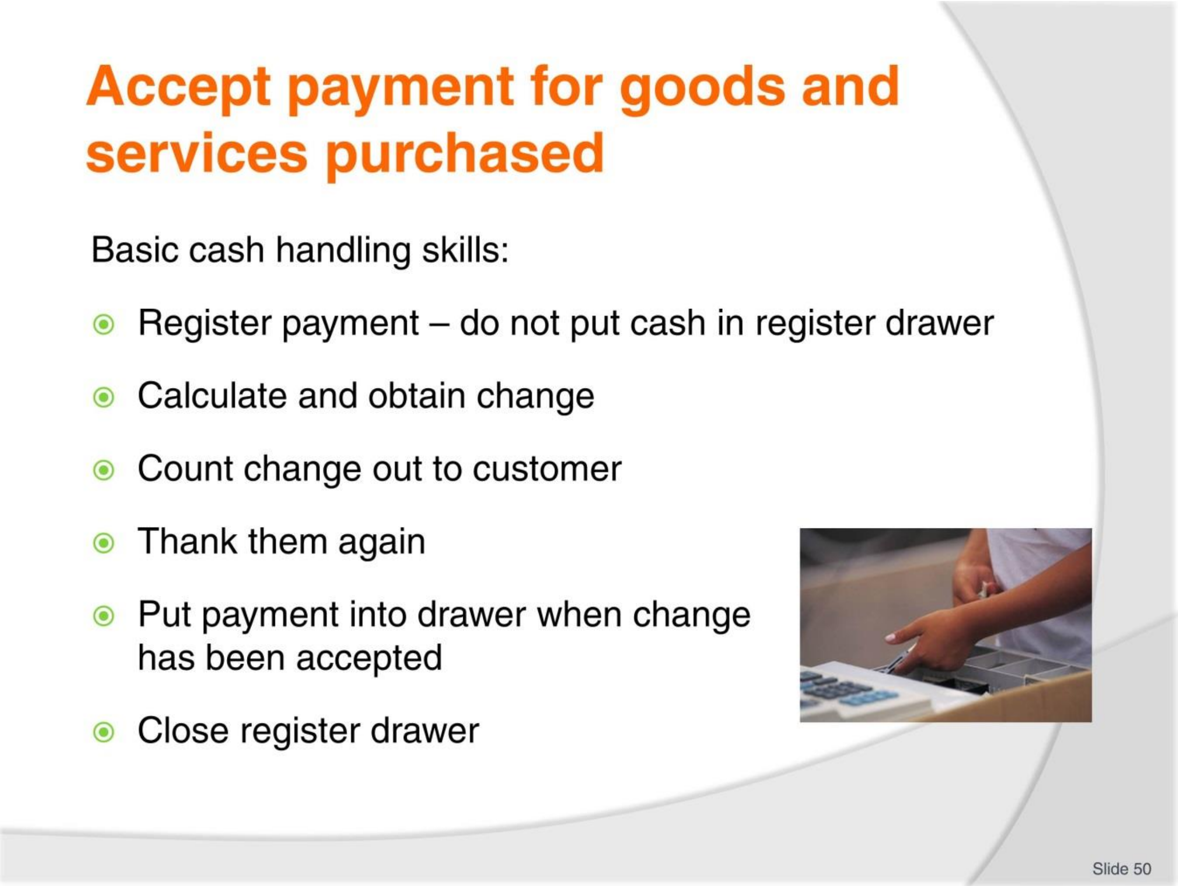
	• Guest account – where a customer is staying in a venue the establishment may feature an option for customers to charge purchases to their room. In these cases: ▪ They may need to pre-load/authorise payment of their purchases to a standard amount levied against all guests ▪ A signature to prove the transaction occurred is usually required ▪ Proof must be obtained the customer is actually the occupant of the room they want to charge items to – by, for example, sighting the room key/card ▪ Maximum daily/stay amount may apply – and the guest needs to pay off totals to be granted extended credit. **Classroom Activity – Demonstration and Practical** Trainer demonstrates accepting payment from customer in the forms listed on the slide and provides opportunity for students to do the same.

Slide


Slide No	Trainer Notes

49.	Trainer presents basic cash handling skills:
	• Advise the customer of the total of their purchase – never assume they know and do not leave it up to them to read the register
	• Say ‘please’ when asking for payment
	• Thank the person for tendering payment
	• State the value of the note/payment they offer in payment – this:
	  ▪ Confirms the amount they have given
	  ▪ Avoids confusion about how much was tendered.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates cash handling skills listed on the slide and provides opportunity for students to do the same.

Slide



Slide No	Trainer Notes
50.	Trainer continues presenting basic cash handling skills: • Register the payment – leaving the money tendered out of the cash register • Calculate and count the change required out of the register – and count it aloud into the customer's hand so they can check the change they have been given • Thank the customer again – when change has been given/accepted • Put payment into the register – when customer has accepted their change • Close the register drawer. **Classroom Activity – Demonstration and Practical** Trainer demonstrates cash handling skills listed on the slide and provides opportunity for students to do the same.

Slide

Establish rapport with customers during the service

Need to establish rapport – to:

- Provide basis for optimising sales
- Create a positive customer experience
- Exceed expectations
- Provide a point of difference
- Demonstrate thanks and appreciation
- Comply with SOPs/policies

Slide 51

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>51.</td><td>
Trainer explains rapport needs to be established with customers for the following reasons – to:

Provide a basis for making extra sales/optimising sales – extra sales are more likely to occur if the customer is in a ‘good’ state on mind about the business
Make the time when customers pay for their purchases a positive experience – this is necessary because paying for their purchases if often the last contact the customer has with the organisation and it is important it is a positive one
Deliver service which meets/exceeds customer expectations – the aim should be every customer should leave the POS area and think ‘Wow! How good was that?’
Provide a point of difference between service providers – many businesses provide very much the same thing in terms of products and services and it is often the quality of the service which differentiates one organisation from another and creates the basis for customers:

Coming back to spend even more money – known as ‘return’ or ‘repeat’ customers
Telling their friends and family about the business so too they spend money with the organisation – known as ‘referral’ customers

Demonstrate gratitude, appreciation and thanks – for the money the customer has spent with the business

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</table>

	• Comply with internal SOPs and policies – relating to: ▪ Customer service ▪ Public statements/promises made about service delivery.

Slide

Establish rapport with customers during the service

Ways to establish rapport:

- Greet customer – smile
- Respond to questions
- Initiate conversation
- Advise of Specials/deals
- Comment positively on purchases made
- Enter customers into competitions for which they are eligible

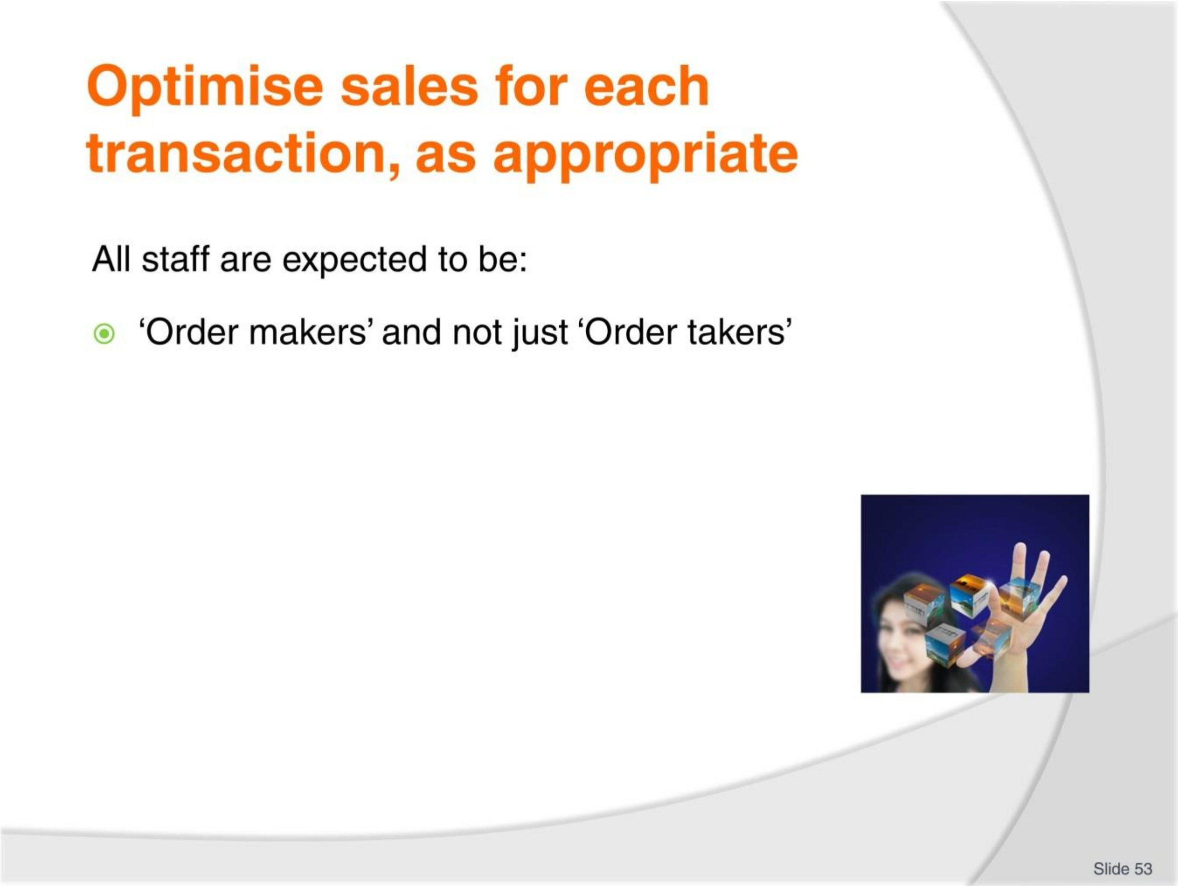
Slide 52

Slide No	Trainer Notes

52.	Trainer states a combination of actions will assist in establishing a good/positive rapport with customers at POS:
	• Greeting customer – when they arrive at the POS station/area. This should include:
	  ▪ Smiling – this is a universal acknowledgement of another person and a critical aspect of customer contact/interaction
	  ▪ Being friendly
	  ▪ Using the customer's name – if it is appropriate to do so
	• Responding to customer questions – when customers are paying for their purchases they often ask questions which must be professionally handled by providing accurate and relevant responses/information to the queries made
	• Initiating and participating in conversation with customers – this often requires sensitive judgement but most customers appreciate being engaged in polite/social chat with the person who is processing their sales. This conversation:
	  ▪ Should supplement and add to the customer experience – and never dominate or detract from any aspect of it
	  ▪ Must avoid interrupting the customer – if they are talking to others or engaged in other activities
	  ▪ Should be practiced/rehearsed and can often start with a comment about the weather

	• Notifying customers of specials available – organisations will often require staff to act as 'sales staff' when they are processing transactions. Generally speaking there can be a requirement: ▪ Customers are never made to feel pressured into buying/making a purchase ▪ To treat this notification as an 'awareness' rather than technique intentionally designed to create additional sales ▪ Inform customers of the savings and/or benefits they may gain from taking advantage of sales/specials ▪ Advise when the sales/specials start – and when they finish • Comment to the customer on their purchase – as part of the transaction it may be possible to incorporate a positive statement to the customer regarding their purchase. Where appropriate (and it is not appropriate for every purchase – things such as small, everyday purchases should not be commented on in this regard) it can be useful to: ▪ Congratulate them on what they have bought ▪ Express sentiment they will be happy with what they have bought ▪ Wish them enjoyment with their purchase ▪ Mention what a great deal they have secured • Entering customer into competitions – as applicable to them on the basis of their purchase and advising them regarding: ▪ How/when the competition is decided ▪ What the prize/s is ▪ How winners will be notified. **Classroom Activity – Demonstration and Practical** Trainer demonstrates techniques for establishing rapport with customers at POS/when processing transactions and provides an opportunity for students to do the same.

Slide



Slide No	Trainer Notes
53.	Trainer emphasis need staff to be ‘Order makers’ and must ‘Order takers’. This highlights business want their staff to optimise sales for each transaction.

Slide

Optimise sales for each transaction, as appropriate

When attempting to optimise sales:

- Never put pressure on people to buy
- All efforts must be 'ethical'
- Items offered should have relevance to the customer
- Individual 'scopes of authority' must be adhered to

Slide 54

Slide No	Trainer Notes
54.	Trainer warned all sales must embrace: • Pressure must never be placed on customers to buy – customers do not appreciate this and will commonly: ▪ Refuse to buy what is being offered ▪ Refuse to return to the business on future occasions • All selling efforts must be ethical – that is, they must: ▪ Feature honest and accurate advice/information – there can never be false statements, claims, assertions or inducements to buy ▪ Fully disclose relevant aspects – that is, information must advise the customer of 'the bad' as well as 'the good' about a product/service ▪ Provide complimentary items 'free of charge' and not charge for them • Products and services offered in this way should have relevance to the customer – this relevance can be determined by: ▪ Their known buying history ▪ Their known likes, dislikes and preferences ▪ Other products/services they are buying at the time ▪ Comments they have made regarding their needs, wants and preferences ▪ Questions they have asked about products and services available

	• Individual scopes of authority must always be observed – this means: ▪ There is never a ‘sell at any cost’ mentality in businesses ▪ Supervisors may need to become involved where decisions to be made exceed personal scopes of authority.

Slide

Optimise sales for each transaction, as appropriate

Sales need to be optimised in order to:

- Generate income
- Enhance business viability
- Secure jobs
- Maintain/increase market share
- Deliver a better service experience to the customer

Slide 55

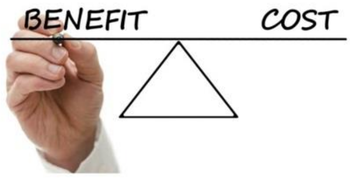
Slide No	Trainer Notes
55.	Trainer explains reasons for staff to create sales – in order to: • Generate income • Enhance business viability • Secure jobs • Maintain/increase market share • Deliver a better service experience to the customer.

Slide

Optimise sales for each transaction, as appropriate

Techniques to optimise sales:

- Raising awareness – by:
  - Showing and demonstrating
  - Making recommendations and suggestions
  - Giving samples/tastes
  - Letting customers handle product/experience a service
- Up-selling
- Making add-on sales

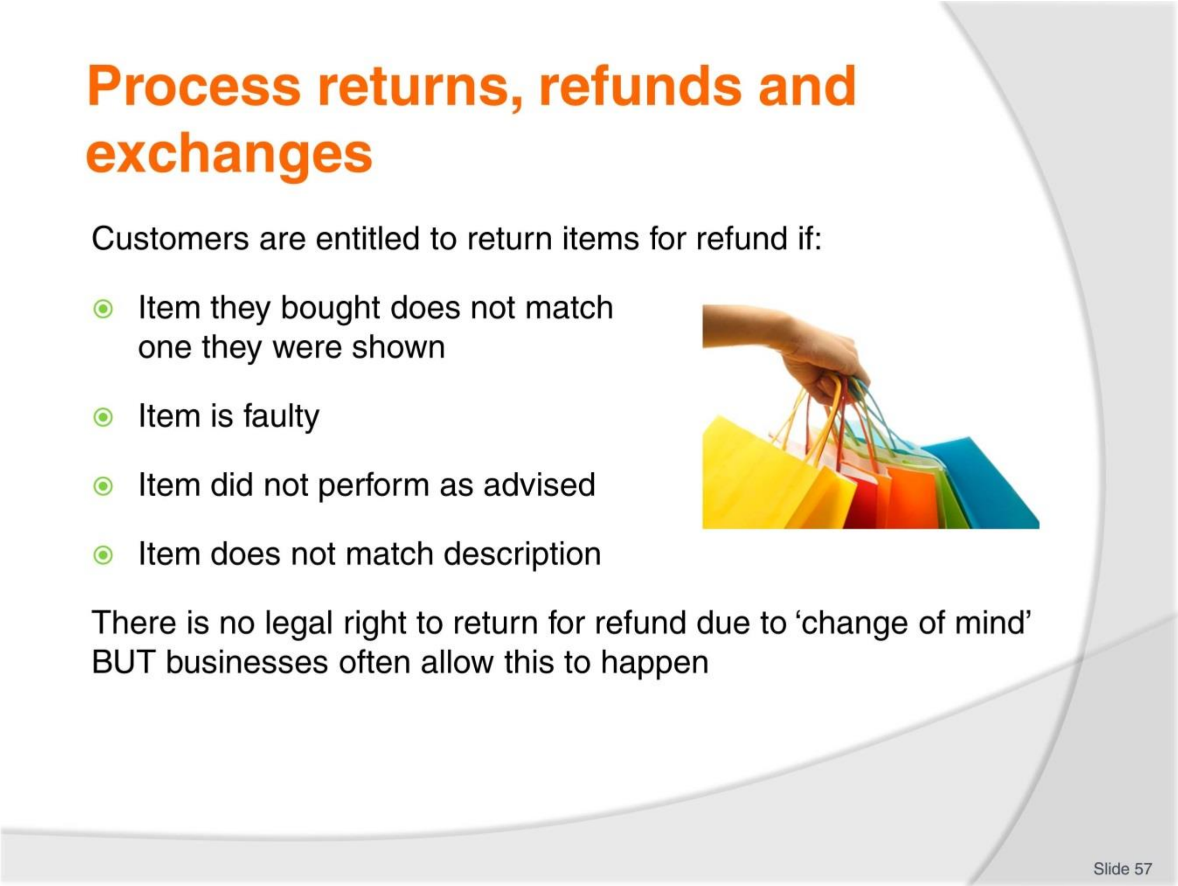


Slide 56

Slide No	Trainer Notes
56.	Trainer presents techniques for optimising sales: • Making buyers aware of other things which are available – which might be achieved by: ▪ Showing different products ▪ Making recommendations and suggestions ▪ Allowing taste tests ▪ Letting purchasers experience a service first-hand, free-of-charge for a short while • Applying up-selling techniques – this involves suggesting a more expensive product or service over a cheaper one originally requested/ordered by the customer: ▪ Not every sales situation provides an opportunity for up-selling ▪ This selling technique is mainly used where the customer orders a product or service, but is not specific about exactly what product they require or the alternatives available to them ▪ Although it can be a useful selling technique, up-selling should not be overused, or be used incorrectly because it has been known to be regarded by some customers as being too sales orientated (that is, focussing on the needs of the *business*) and not focused on satisfying *customer* wants and needs

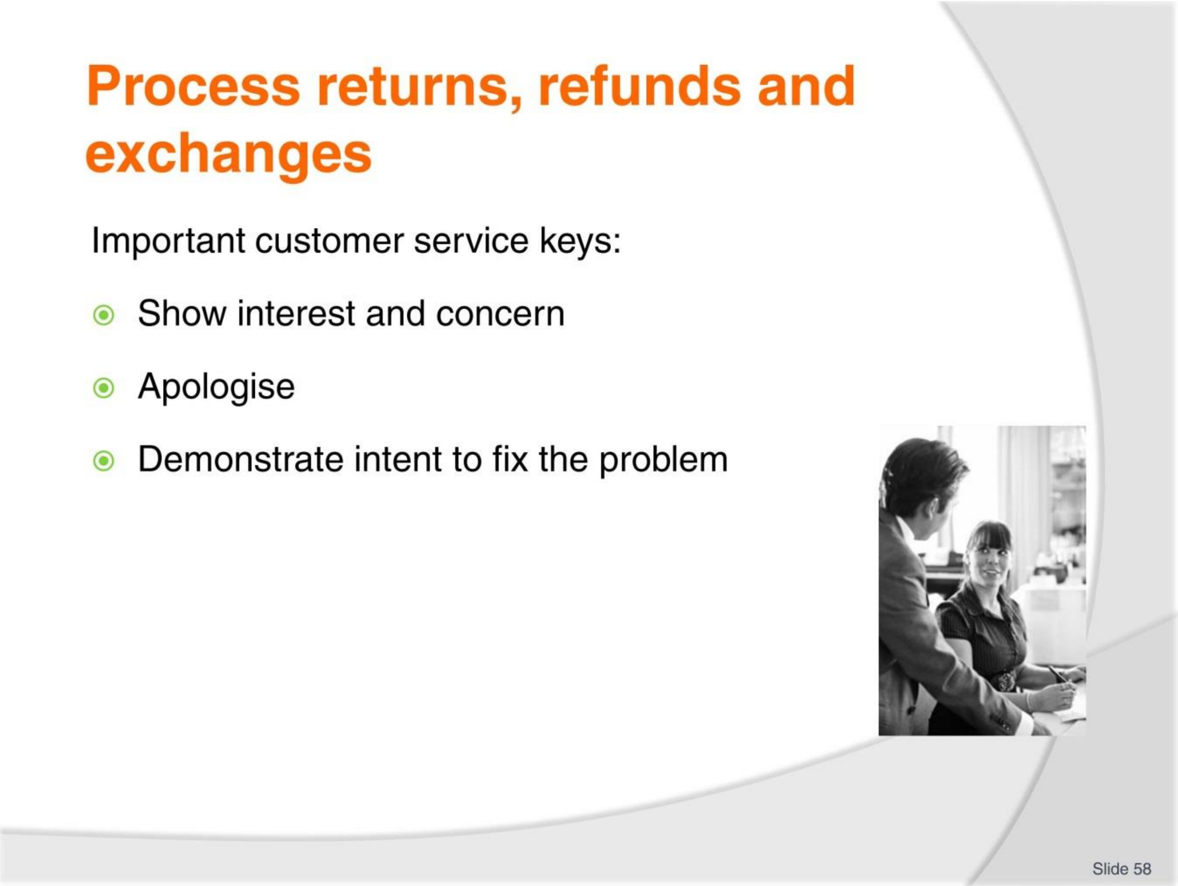
	▪ When up-selling it is vital to explain/illustrate how the more expensive alternative provides better value, or some other benefit, to the customer • Applying add-on sales techniques – this approach means building on the customer's *stated request* to sell additional products/services the customer did not ask for: ▪ It can be a very service-oriented technique because the customer may have forgotten to ask for these products/services or may not have been aware of them and so will be grateful for being informed about them/reminded of them ▪ For this technique to be effective the items offered must relate to the purchase already made by the customer. **Classroom Activity – Demonstration and Practical** Trainer demonstrates techniques for optimising sales as identified on the slide and provides opportunity for students to do the same.

Slide



Slide No	Trainer Notes
57.	Trainer explains customers have a legislated right to a refund under certain conditions, such as: • The item is not in accord with the one they were shown or had demonstrated to them • The item is faulty and the customer could not have realistically known about the fault • The item did not perform as sales staff described it would • The item fails to measure up to the description that was made about it. Customers are not legally entitled to a refund simply because they have taken the item home and then decided they do not really want it or they have changed their mind. This said, however, many organisations are happy to accept and process these returns for the sake of good customer relations.

Slide



Slide No	Trainer Notes
58.	Trainer presents three important requirements of customer service when processing returns/refunds are: • Show genuine interest and concern by demonstrating an empathetic attitude • Apologise for the problem/situation • Demonstrate you are interested in solving their problem, rather than trying to cause them more problems.

Slide

Process returns, refunds and exchanges

It is important to know:

- Organisational policy
- Personal discretion to resolve issues/help the customer

Slide 59

Slide No	Trainer Notes
59.	Trainer adds when processing exchanges, refunds and returns it is vital to know: • Organisational policy – as applicable to each situation: ▪ The specifics of each situation can vary and all must be handed correctly • Personal authority to use discretion – generally there is a need to be an advocate for the customer but it is important to never take any action on behalf of the customer that is outside the individual specified discretionary authority: ▪ Businesses commonly allow sales staff who deal with exchanges, refunds and returns prescribed 'room to manoeuvre' in order to achieve a successful outcome for the customer (and the organisation) so it is imperative to exerciser this discretion but not exceed it.

Slide


Slide No	Trainer Notes
60.	Trainer explains processing these items can involve: • Apologising – this is a standard requirement even in situations where an apology may not be genuinely warranted: it is expected by customers as part of standard customer service protocol • Explaining situations where a return, refund or exchange cannot be processed – and giving reasons in accordance with: ▪ House policies ▪ Stated organisational Codes of Practice ▪ Legal obligations ▪ Formal internal training • Verifying proof of purchase, or proof of ownership, for return, refund or exchange transactions – this may not be required (legally or by the business) but is an increasingly common requirement to: ▪ Foil people who steal from businesses and return products for a cash refund ▪ Ensure the items presented for processing were, in fact, bought from the business and not purchased elsewhere • Completing the appropriate documentation to record the transaction – this will be a purpose-specific form

	• Contacting supervisor – as required: ▪ For advice and guidance ▪ For permission to act outside scope of authority ▪ For authority to give cash refunds – many organisations insist supervisors/managers are the only personnel able to give customers cash from a register/terminal • Recording the process, as appropriate, through the point of sale register/terminal – making sure: ▪ The appropriate transaction key is used ▪ Relevant other keys are used/data is entered. **Classroom Activity – Demonstration and Practical** Trainer demonstrates how to process refunds, returns and exchanges providing opportunity for students to do same.

Slide

Create and maintain efficient service levels at point of sale area

To keep POS areas functioning at their most efficient it is necessary to:

- Be accurate in what is done
- Process transactions promptly
- Give quality service

(Continued)

Slide 61

Slide No	Trainer Notes
61.	Trainer explains to keep POS areas functioning at their most efficient and effective it is necessary for workers to:

- Be accurate – it is important to make sure the correct amount for a sale is charged, received and the correct change is given
- Process transactions quickly – customers do not want to waste time waiting for their sales to be processed and change to be given to them but speed in processing must not occur:
  - At the expense of acceptable customer service levels
  - Sacrificing accuracy – it is better/more important to be accurate than fast
- Give quality service – in terms of:
  - Courtesy
  - Interpersonal skills
  - Communication.

Classroom Activity – Excursion

Trainer organises for students to visit a relevant business to:

- Witness preparation activities prior to opening their POS area
- Observe the opening procedure

	• Watch processing of transactions and staff interactions with customers • Talk to staff and management • Obtain sample documents.

Slide

Create and maintain efficient service levels at point of sale area

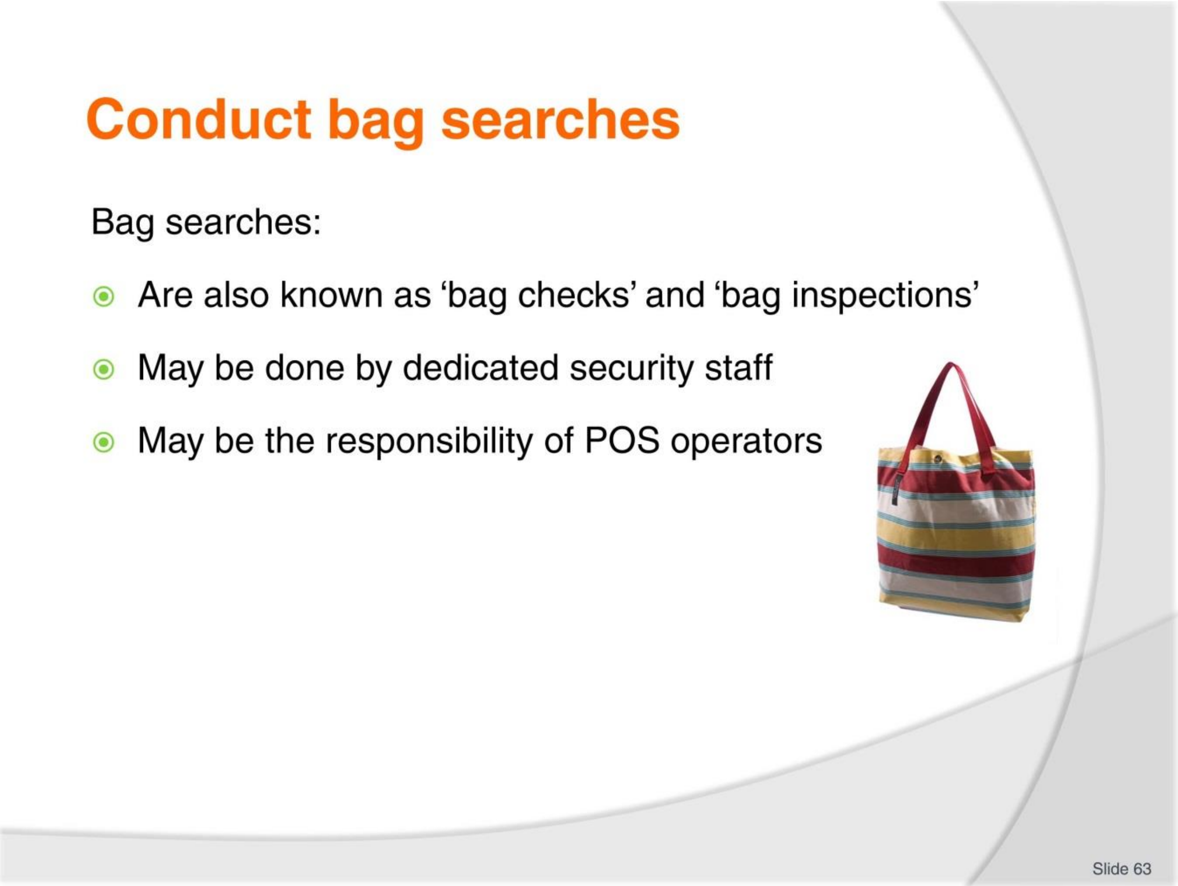
- Monitor POS area to predict problems/requirements
- Advise customers about delays and address/resolve those situations
- Keep the area clean, tidy and presentable

Slide 62

Slide No	Trainer Notes
62.	Trainer continues describing requirements to keep POS areas operating efficiently and effectively: • Monitor the point of sale area – to: ▪ Identify/foresee situations operational problems and requirements ▪ Take action to address identified service-related issue or problems ▪ Ensure sufficient supplies of: – Cash/change – Service-related documents ▪ Clear and clean service area where spills have occurred ▪ Adjust air conditioning, lighting and music as required throughout trade • Advise customers of expected delays in processing their transactions – including: ▪ Apologising ▪ Explaining the cause of the delay ▪ Advising the anticipated length of delay ▪ Providing an alternate service point/option, if possible

	• Monitor and clean the area around the point of sale service area – including: ▪ Behind the service area ▪ From the customer’s side of the service point.

Slide

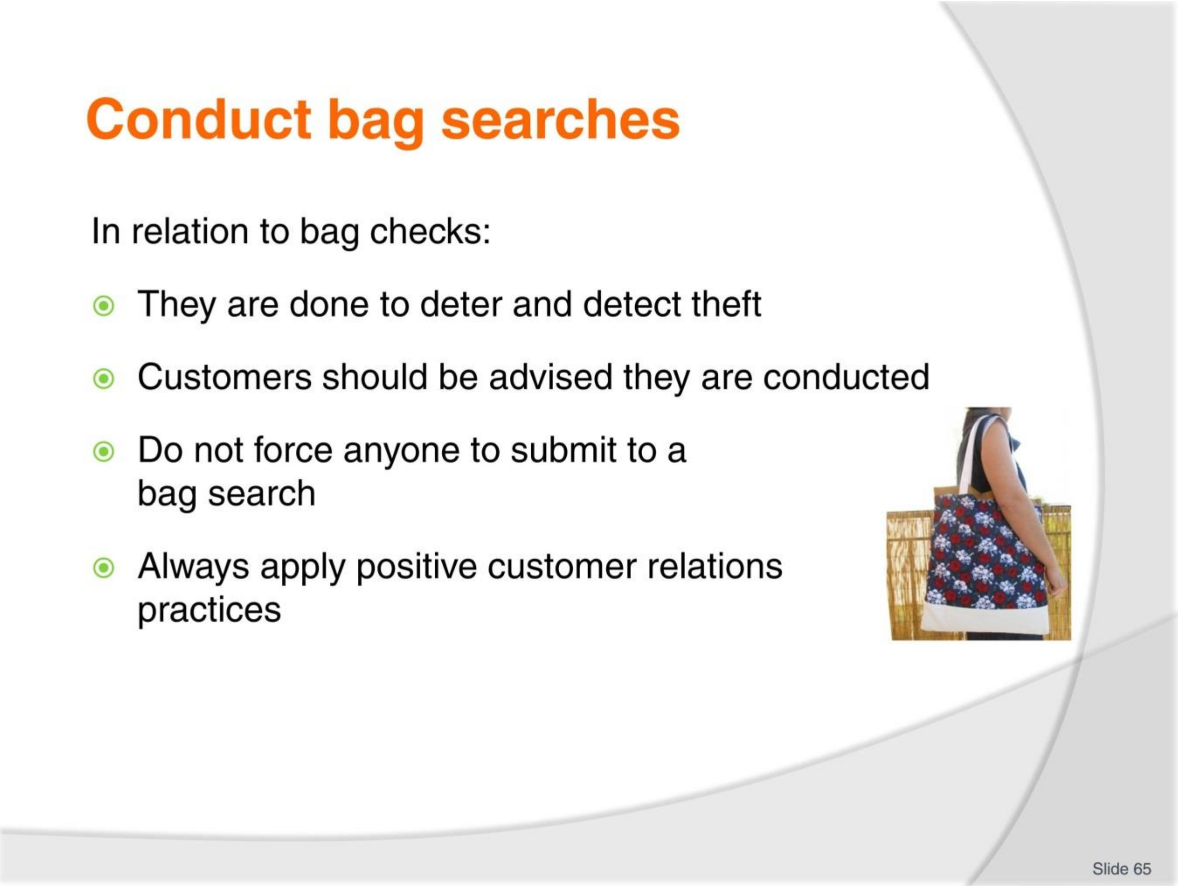


Slide No	Trainer Notes
63.	Trainer explains bag searches, also known as ‘bag checks’ and ‘bag inspections’ may be conducted by: • Full-time security staff – whose job it is to a visible deterrent to shoplifters and detect theft • Service staff – who check bags as part of their standard service role when operating the POS area.

Slide

Slide No	Trainer Notes
64.	Trainer explains bags may be checked: • For every person who transits the POS area – regardless of: ▪ Who they are ▪ Whether or not they have made a purchase ▪ How much they have spent ▪ The type of bag/s they are carrying • Only for those persons who are identified as being 'suspicious' • Only where bags are suspected of containing something that has been taken without having been paid for.

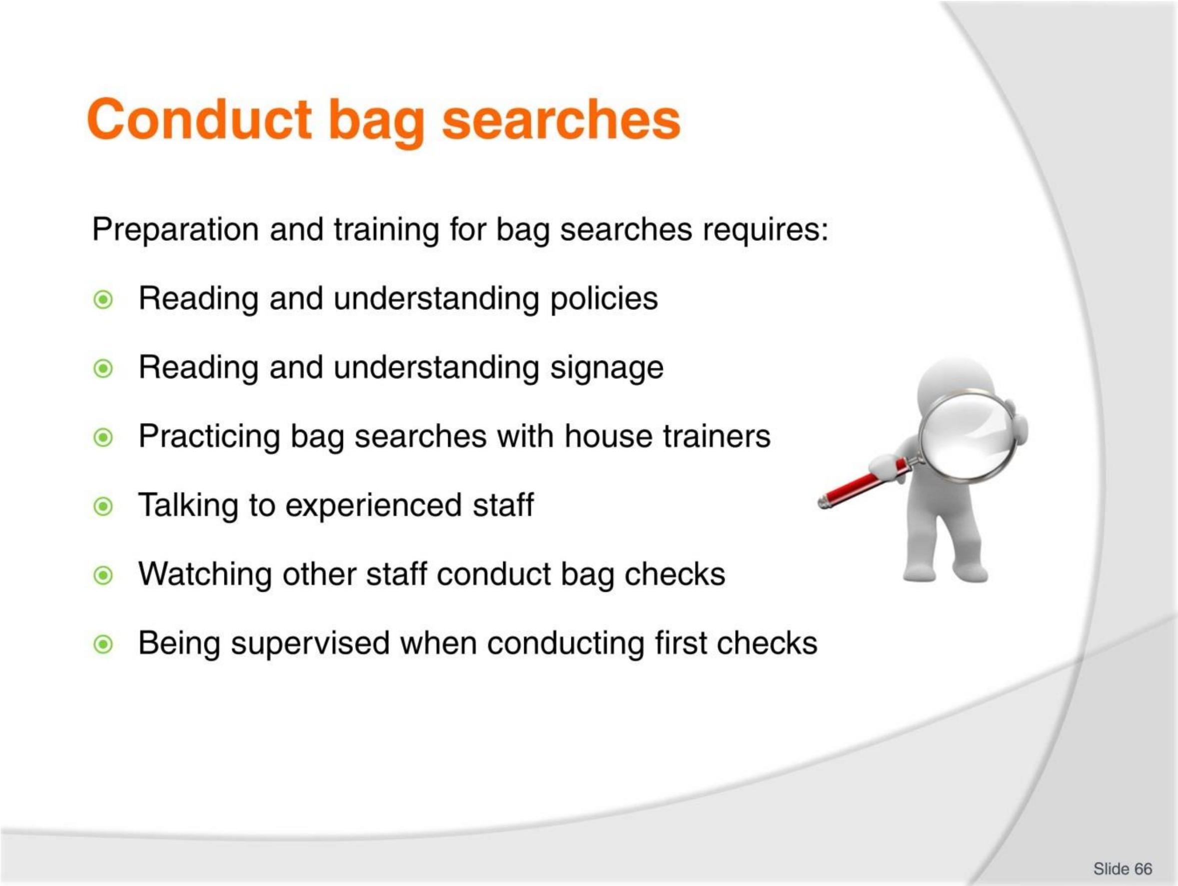
Slide



Slide No	Trainer Notes

65.	Trainer gives further content for bag checks stating:
	• Businesses check customers' bags to try to control theft and it is a practice fraught with danger as it can easily cause embarrassment and readily give offence
	• The business should/must advise customers bag checks are conducted at the premises – the most common way of doing this is via a standard sign posted at, or near, the entrances:
	  ▪ This sign clearly sets out the rights and obligations of both the organisation and the customer
	  ▪ In general terms most customers who walk into a business enter 'under licence' meaning the owner can set conditions governing their entry
	  ▪ One of these conditions may be – and frequently is – customers allow their bags to be searched by staff, on request
	  ▪ When the customer enters a location where such signage is displayed, they are automatically agreeing to the conditions. Businesses with a large number of customers from different language groups are advised to have signs in languages appropriate to their customer profiles
	• Even though businesses may have the legal right to search/check customers' bags, anyone who *forcibly* conducts such a check/inspection may very well find themselves being charged with assault
	• As with any aspect of customer service – including aspects relating to detection of theft – courtesy is paramount: not only can it help to defuse a situation, but courtesy can encourage cooperation and avoid court cases.

Slide



<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>66.</td><td>
Trainer discusses training and preparation for bag searches stating SOPs require:

Reading and understanding the relevant organisational policies
Reading and understanding related signage advising customers about bag checking policies and procedures
Talking to experienced staff about their experiences with checking customers’ bags
Practicing bag searches – in a training room situation with trainers providing feedback and advice
Observing an experienced staff member conduct several bag checks to identify:

What is said
How things are done
Body language used
Type of problems and responses encountered

Being supervised while conducting first actual bag checks – this enables feedback to be given to and also provides a sense of confidence knowing someone is there to assist and advise if necessary.

Classroom Activity – Guest Speaker
Trainer arranges for police representative to attend and discuss legalities of host country in relation to conducting bag checks.
</td></tr>
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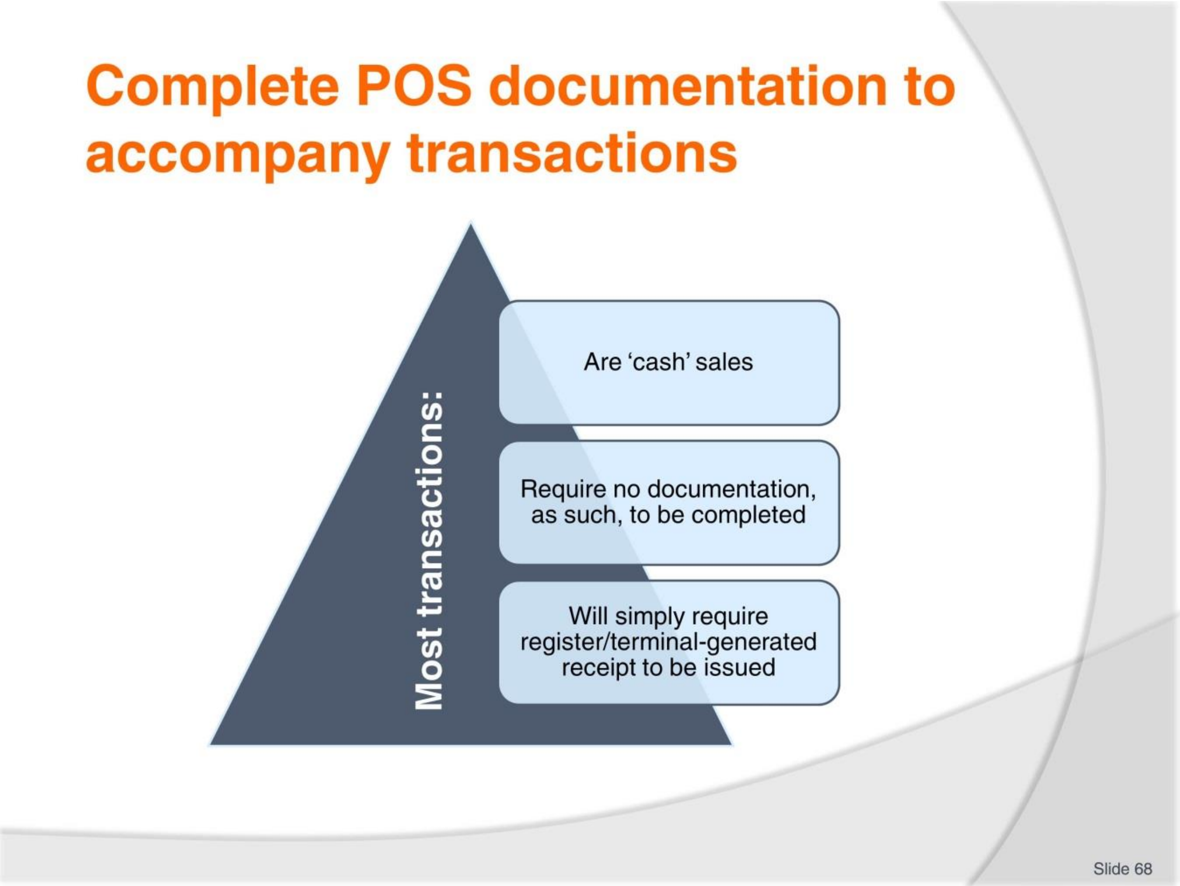
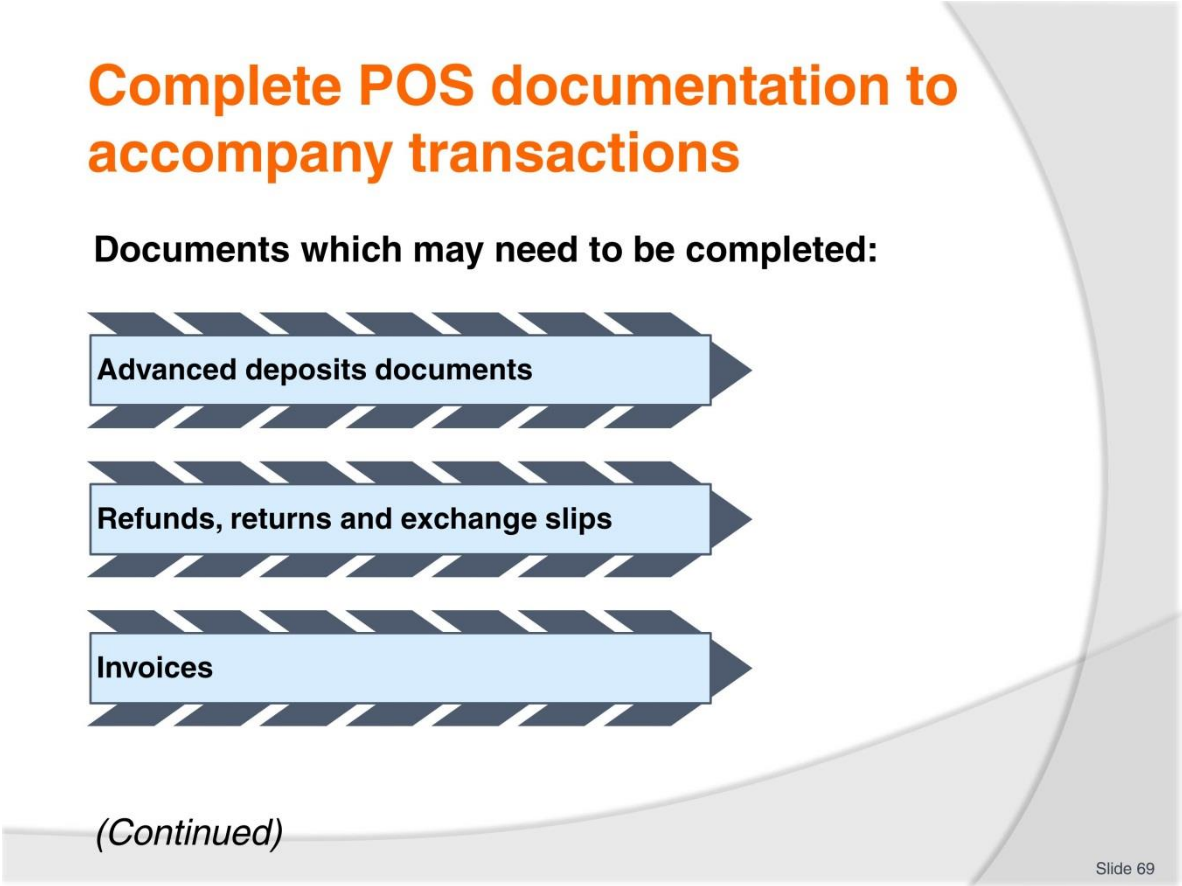
Slide

Slide No	Trainer Notes
67.	Trainer presents practicalities of checking customer bags: • Ask customers to open their bags – this is to avoid staff having to make any contact with the contents of the bag: ▪ If something is blocking the view of what is in the bag, ask the customers to move it – It must not be touched by staff ▪ Where the staff touch the bag, or the obstruction in the bag, this may provide a ready-made defence to legal action as it allows customers to assert staff put the item in the bag • Customers can refuse to have their bags inspected – they have a right to do this: ▪ If this occurs there is little that can be done. They cannot be forced to have their bags checked ▪ Where a customer refuses attempts to check their bag, all that can happen is staff can ask them to leave the business and not return (providing this is what is provided for by organisational policy) • Never attempt to detain a customer just because they are refusing to have their bag inspected – unless absolutely sure they have stolen something: ▪ Forcibly detaining someone if they have not done anything wrong is a primary cause of legal action for, say, false imprisonment • Never get into an argument with the customer over a bag search – get help as soon as possible from security or the manager immediately.

	Classroom Activity – Demonstration and Practical Trainer demonstrates how to conduct a legal bag check and presents opportunity for students to practice same.

Slide	
	
Slide No	**Trainer Notes**
68.	Trainer highlights: • Many transactions will be straight-forward 'cash sales' meaning no paperwork needs to be completed • In these cases the register will automatically print a receipt which is handed to the customer during the sales process as proof of their purchase.

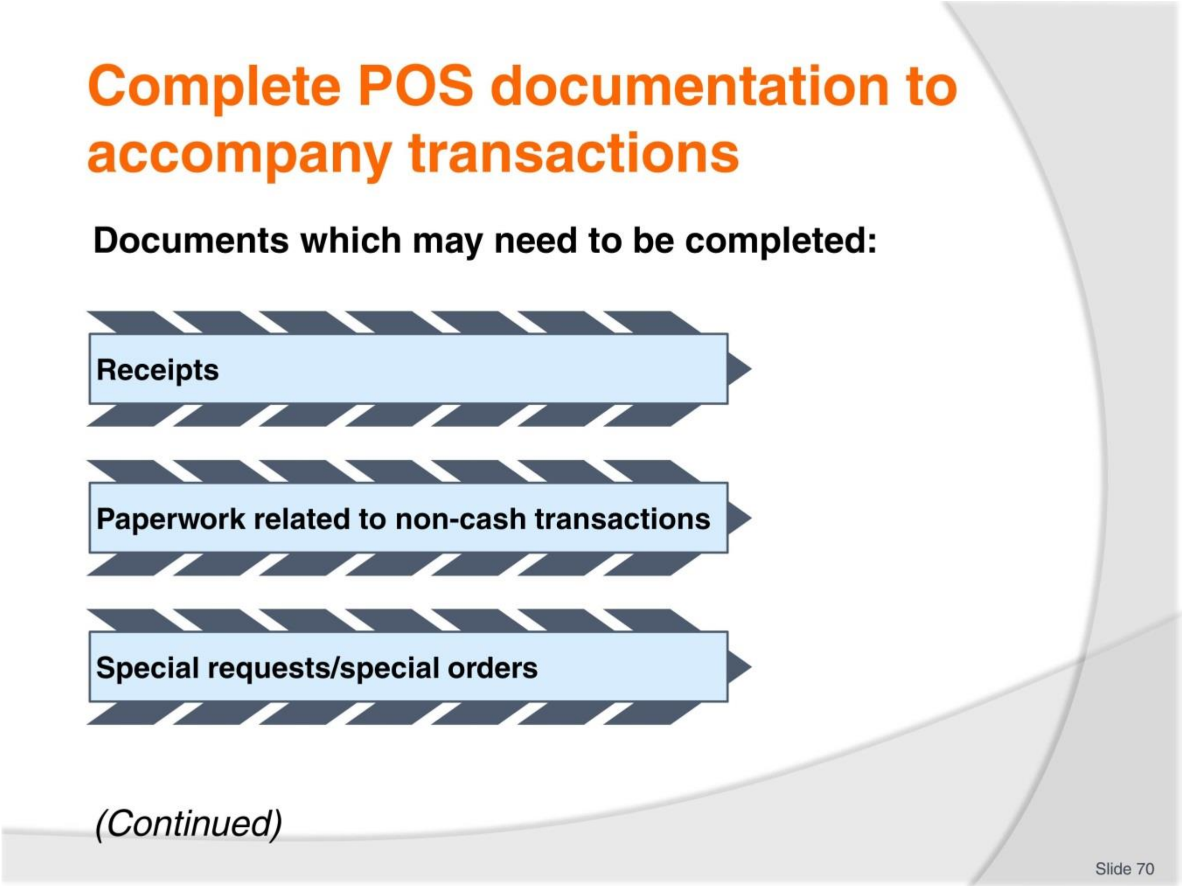
Slide



Slide No	Trainer Notes
69.	Trainer identifies documents which may need to be completed: • Advance deposits documentation – which records deposits paid (and acts as proof money has been paid) by customers detailing: ▪ Name of customer; Name of/type of booking (travel, accommodation, tickets, goods, services); Method used to make deposit payment; Date and time; Name of person processing the transaction; Amount paid; Balance outstanding • Refunds, returns and exchanges slips – where items have been returned the documentation will need to: ▪ Detail the item returned; List the name of the person returning it and their address and signature; Give reason for return/dissatisfaction ; Provide details of the initial purchase – the receipt for the initial purchase is usually stapled/sticky-taped to this documentation; Describe action taken – to resolve/address the situation: – ‘Issued cash refund’; ‘Provided store credit’; ‘Exchanged for new item’. • Invoices – an invoice is a ‘bill’ for items/services which have been purchased and forms the basis on which the customer may make payment: ▪ Administration are usually responsible for preparing invoices but there may be a *pro forma* invoice book at POS which staff are required to complete, by: – Describing type and quantity of items bought; Listing prices of individual items; Calculating extensions and totals; Incorporating relevant taxes; Writing name and address of organisation and customer.

	Classroom Activity – Demonstration and Practical Trainer demonstrates completion of documentation identified on the slide and provides an opportunity for students to do the same.

Slide

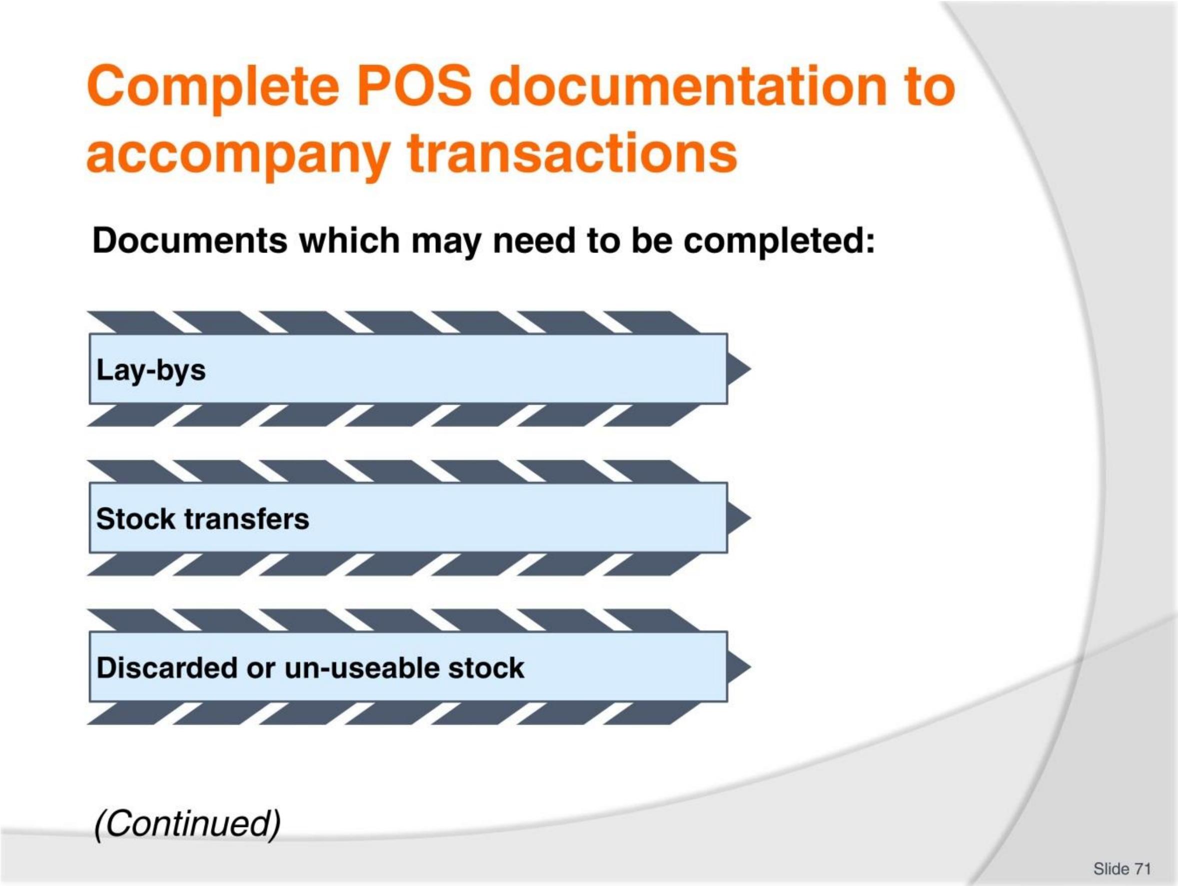


Slide No	Trainer Notes
70.	Trainer continues identifying documents which may need to be completed:

- Receipts – where the cash register does not issue a receipt for money paid there can be a *pro forma* receipt book at POS which staff are required to complete, by:
  - Listing date; Writing in amount paid; Identifying what the money was paid/received for; Noting type/method of payment; Signing and/or stamping the receipt
- Paperwork related to non-cash transactions – where sales are processed using a non-cash option documents will need to be completed to record the sales and provide the basis for further processing and redeeming of the cash:
  - The exact nature of the documents and the detail which needs to be completed will depend on the system being used, as many systems automatically generate much of the required detail. In general terms there may be a need to complete:
    - Vouchers and coupons; Internal accounts
    - Room charges
- Special requests – if the organisation is prepared to take special orders from customers there can be a need to compete a Special Request form detailing:
  - Name of customer; Their contact details; Name and quantity of special order/request; Price quoted, if applicable; Action the customer was told would be taken.

	Classroom Activity – Demonstration and Practical Trainer demonstrates completion of documentation identified on the slide and provides an opportunity for students to do the same.

Slide

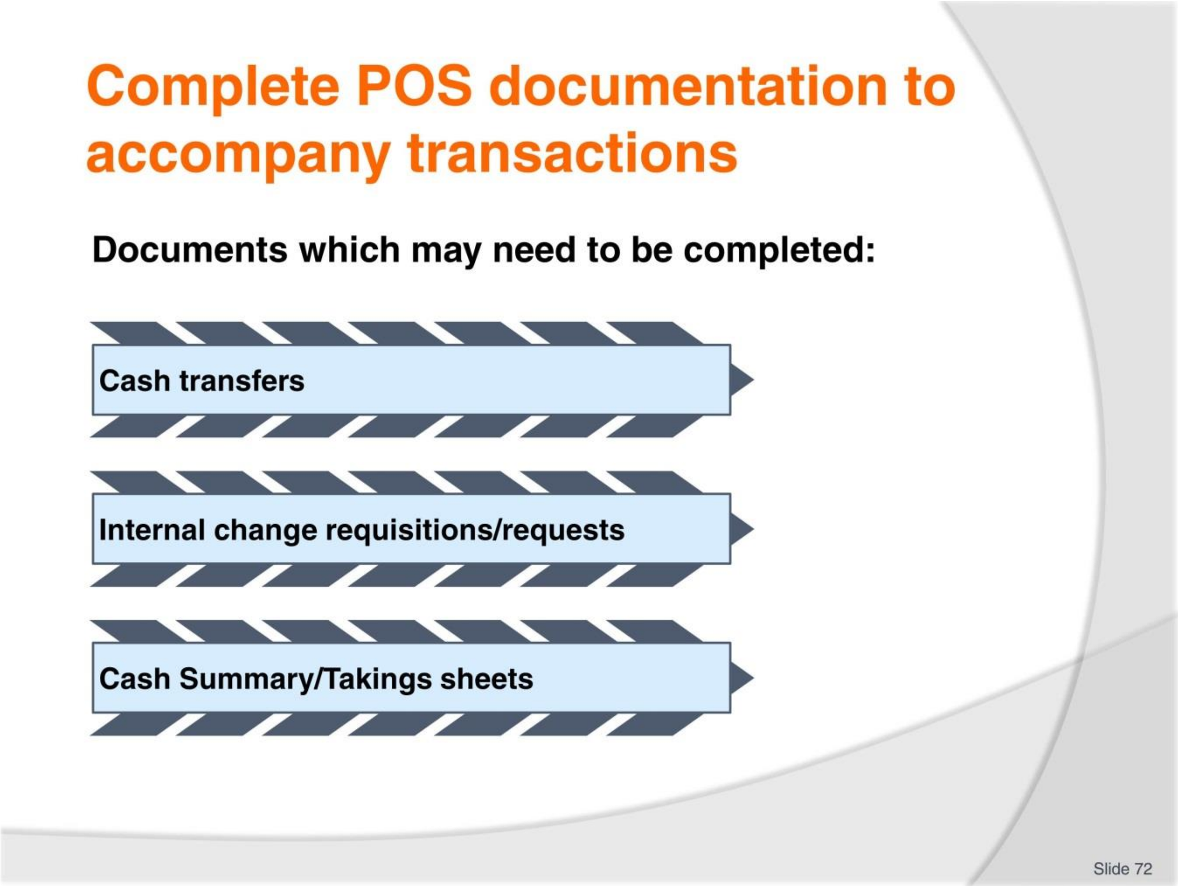


Slide No	Trainer Notes
71.	Trainer continues identifying documents which may need to be completed:

- Lay-bys – some businesses have a lay-by scheme in place allowing the customer to place a holding deposit on an item and have it kept at the shop until it is fully paid for:
  - A minimum deposit is required, which is commonly calculated as a percentage of the item/s – say, 10% – with some regular (perhaps, fortnightly) and minimum payment being needed to continue the arrangement. Goods usually need to be paid off within a nominated time. Items not paid for by that time may be forfeited, and the customer may also lose all, or most, of their money
  - Traditionally, lay-bys are interest free. A small one-off establishment fee may apply, depending on the store
  - Details to be completed on lay-by documents will include:
    - Name of customer; Their contact details; Item/s placed on lay-by; Total selling price; Amount of deposit paid; Date; Signature from customer verifying Terms and Conditions were given/explained
- Stock transfers – where goods are moved from one department to another department within the organisation an internal stock transfer sheet needs to be completed. This form details:
  - Date stock was re-located; Name of department stock was moved from; Name of department stock was moved to; Description of stock; Quantity; Signature of person transferring the stock

	• Discarded or un-useable stock – that has been removed from sale, detailing: ▪ Date; Name of department stock was taken from; Details of stock by description and quantity; Action taken in relation to the item/s; Name/signature of person taking the action – an authorising signature from a supervisor/manager may also be required. **Classroom Activity – Demonstration and Practical** Trainer demonstrates completion of documentation identified on the slide and provides an opportunity for students to do the same.

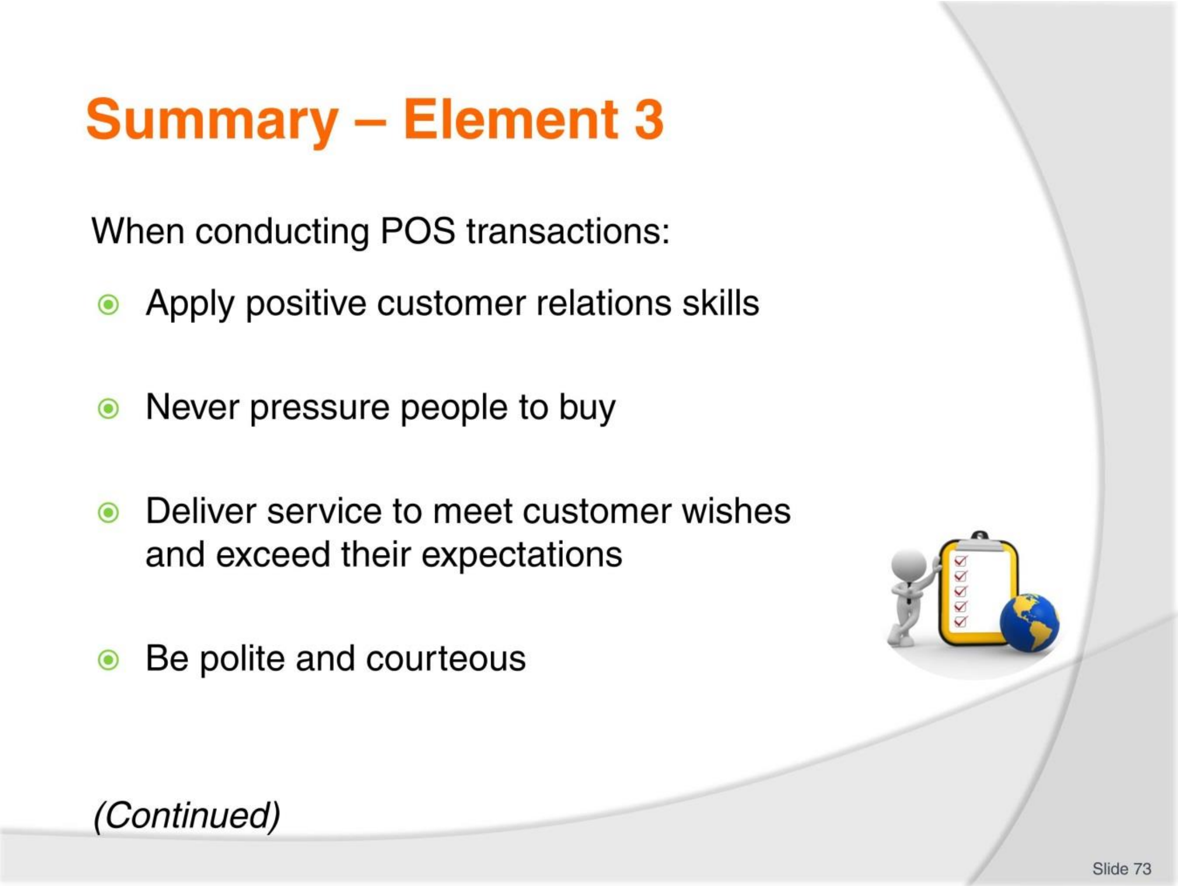
Slide



Slide No	Trainer Notes

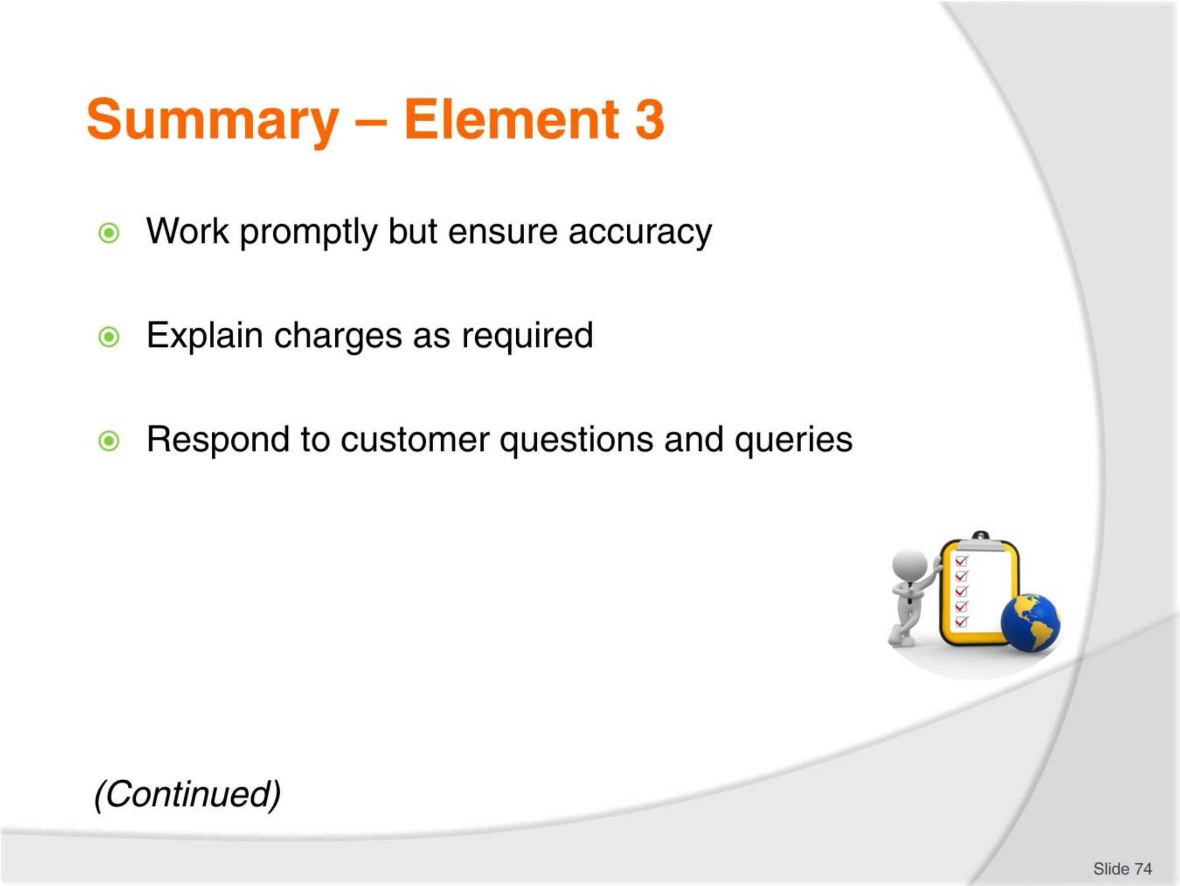
72.	Trainer continues identifying documents which may need to be completed:
	• Cash transfers – detailing money taken from cash register during trade identifying:
	  ▪ Time taken; Amount taken; Name of person taking it
	• Internal change requisitions – detailing:
	  ▪ Date; Register number; Money tendered as the basis for change
	  ▪ Details of the change (coins and notes, by denominations) required in exchange
	• End-of-trade or end-of-shift reconciliations – this may require completion of a 'Cash Summary/Reconciliation Sheet' which will be covered on later slides.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates completion of documentation identified on the slide and provides an opportunity for students to do the same.

Slide



Slide No	Trainer Notes
73.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



Slide No	Trainer Notes
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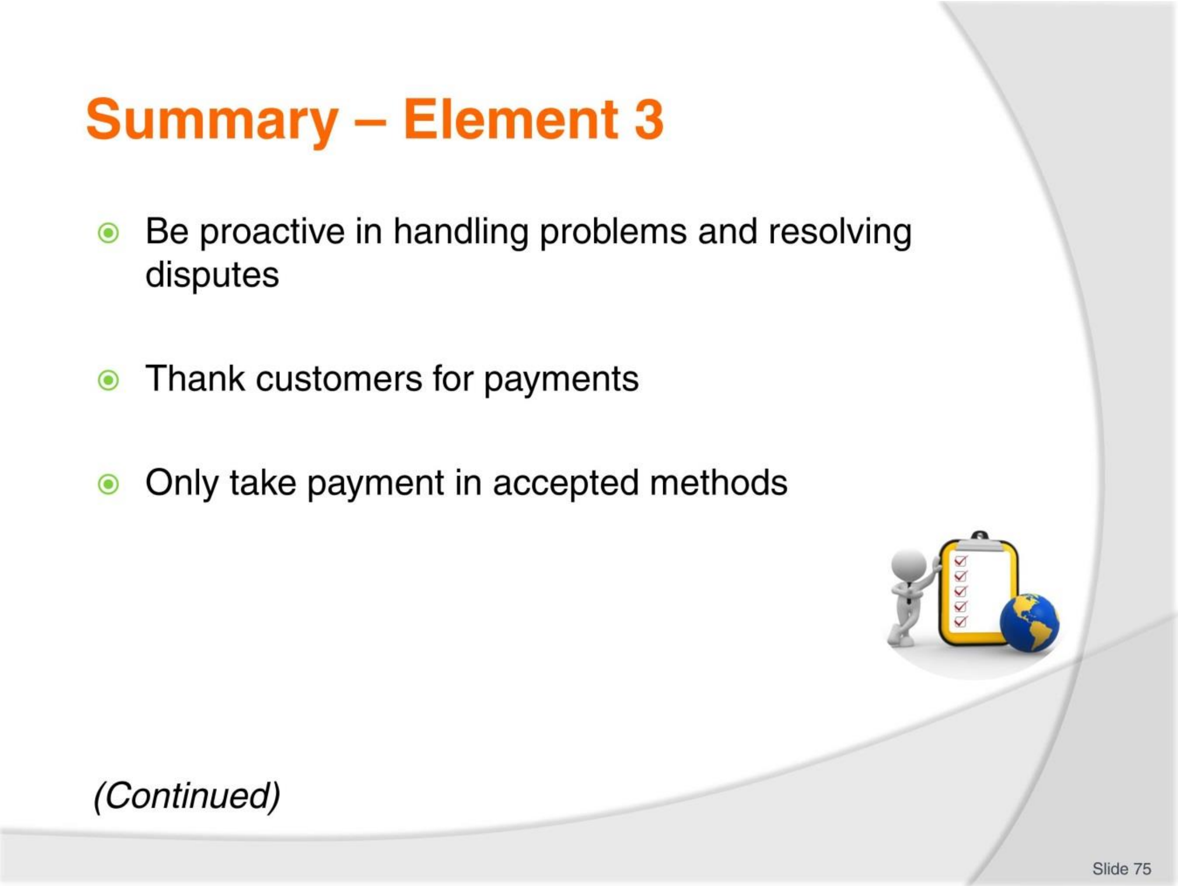

Slide No	Trainer Notes
75.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

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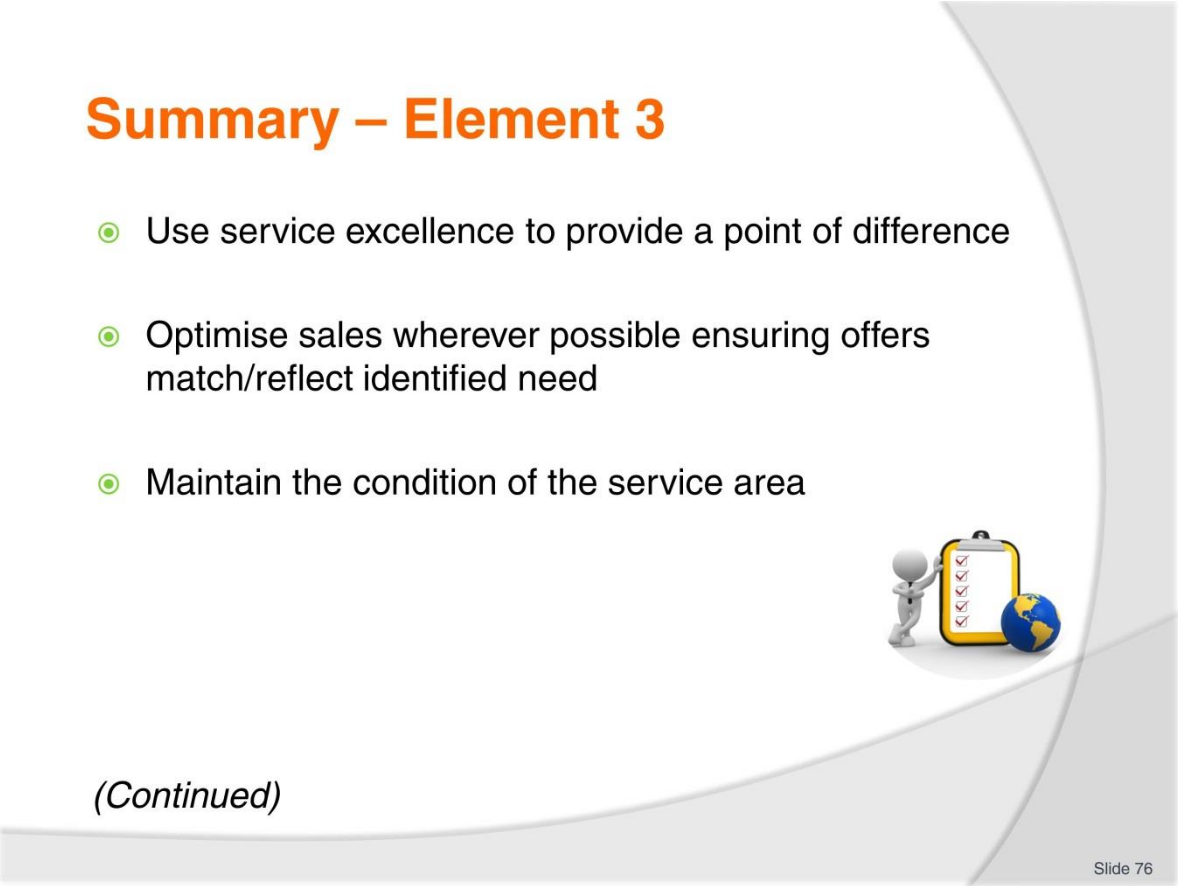
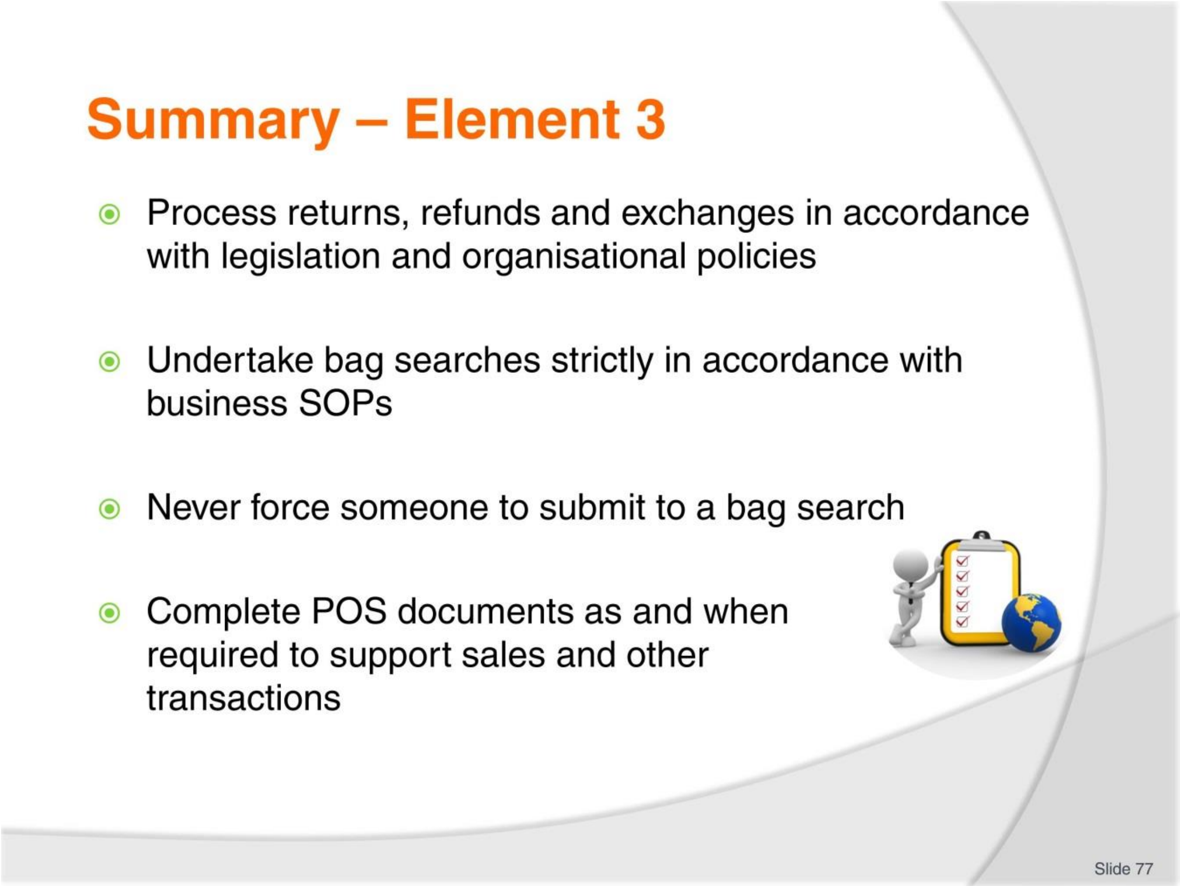


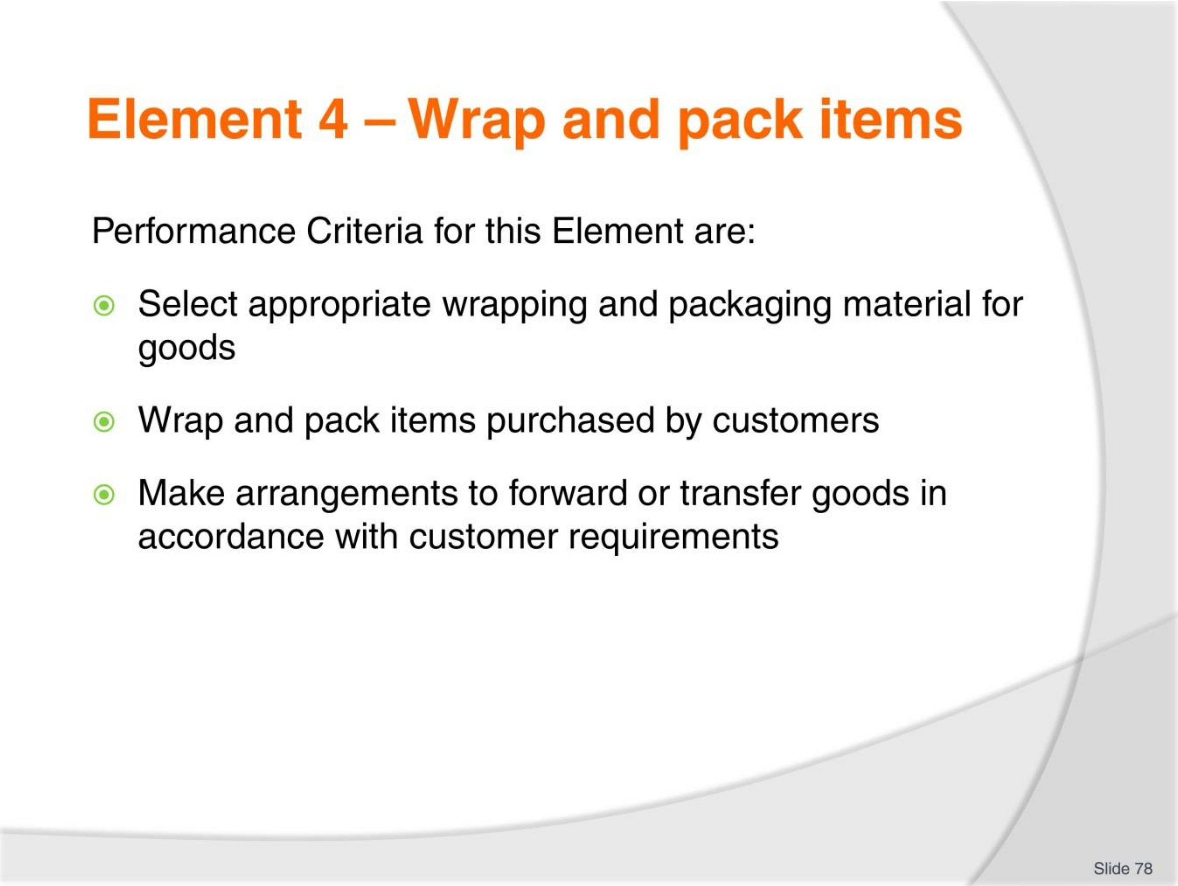
Slide No	Trainer Notes
76.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



Slide No	Trainer Notes
77.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



Slide No	Trainer Notes
78.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide. **Class Activity – General Discussion** Trainer leads a general class discussion by asking questions such as: • What experience do you have in wrapping and packaging items? • What do you think are key elements in this job? • Is this task an important one? Why? Why not? • What is meant by forwarding/transferring goods?

Slide

Slide No	Trainer Notes
79.	Trainer provides context for wrapping and packing of items stating: • It is fair to say most travel and tourism operators do not use much in the way of wrapping and packing equipment or materials • The range of items and materials employed is usually quite simple and basic but each workplace carries the potential for different things to be used • In the majority of cases: ▪ Merchandise sold is placed into a store bag – that is, the item is placed inside a carrier bag bearing the name of the operator without being wrapped ▪ Items sold are pre-wrapped – meaning there is no need for further wrapping and packaging ▪ Customers are happy to take the item 'as is' – without it needing to be wrapped or packed in any way ▪ Tickets are placed into dedicated ticket wallets – which also contain associated items such as itineraries and vouchers/coupons.

Slide

Select appropriate wrapping and packaging material for goods

If there is a need to wrap/pack the following are considerations:

- Take into account the individual
- Factor in the nature/type of item
- Heed stated customer preferences
- Take account of available time

(Continued)

Slide 80

Slide No	Trainer Notes
80.	Trainer states factors to take into account when selecting wrapping and packaging materials will vary dependent on: • The customer being served – some customers are VIPs and receive premium service while others may not receive the same standard/degree of service • The item being sold – different products require different handling techniques and materials and there is always a need to match the wrapping/packaging to the individual item/s • Customer preferences – some people can make special demands/requests for wrapping and packaging of goods they purchase • Time available – less attention is generally paid to wrapping and packaging when the POS area is very busy and/or under-staffed.

Slide


Slide No	Trainer Notes
81.	Trainer continues presenting factors to note when wrapping/packing: • Cost – it is important to provide wrapping and packaging of items to a required standard (where possible) but it is also necessary to minimise associated cost: ▪ In some cases there can be a need to charge customers for special wrapping/packaging such as: – Gift wrapping – Preparing items for international travel • Need to protect items from damage – especially fragile items and those which can be expected to be easily damaged • Organisational policies – there may be certain requirements which need to be accommodated such as those relating to: ▪ Safety ▪ Maintaining the image of the business ▪ Use of preferred wrapping materials based on environmental concerns and a company commitment to recycling • Consistency – while there will always be the need to individualise the way some items are wrapped or packed, there is also a need for the business to establish a standard system of wrapping that gives some predictability to:

	▪ The wrapping and packaging materials that need to be stocked – The training given to staff – Wrapping costs the business incurs – Meeting customer expectations.

Slide

Wrap and pack items purchased by customers

Key factors:

- Maintain positive contact
- Keep communicating
- Work quickly
- Ensure safety of/protection for the goods

(Continued)

Slide 82

Slide No	Trainer Notes
82.	Trainer presents key factors when wrapping and packing are to: • Maintain positive contact with the customer – never ignore them when wrapping/packing their goods • Keep communicating with them and use the time to build on the relationship already established • Work quickly – to avoid keeping the customer waiting but make sure the job is done properly • Ensure the safety of the item being wrapped/packed – if the item breaks/is damaged as a result of poor packing/wrapping it will reflect badly on the business and may give rise to a claim for replacement.

Slide

Wrap and pack items purchased by customers

Key factors:

- Focus on appearance of the end result
- Never over-load bags
- Ensure security of package
- Wrap items appropriately for travel/transport
- Thank the customer

Slide 83

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>83.</td><td>
Trainer continues presenting key factors when wrapping and packing are to:

Focus on the end result – always strive to produce an attractive final product that reflects well on the business especially if the wrapping/packaging carries the name of the organisation
Never over-load bags – this is one of the most common mistakes made by service staff and one of the most annoying to customers:
Over-loaded bags can be difficult to carry and increase the risk of the bag breaking and damaging the items inside
Take care to ensure the final packages are secure – and not too heavy to be carried safely/easily by the customer or transported by a carrier, as appropriate
Provide special wrapping and packaging services for goods that are to be transported/delivered – to protect them possible damage caused by excess handling
Thank the customer again – when the wrapping/packing is completed and the item is handed over to them.

Classroom Activity – Demonstration and Practical
Trainer demonstrates wrapping and packing of a variety of items providing students with opportunity to do same.
</td></tr>
</table>

Slide

Slide No	Trainer Notes
84.	Trainer explains ‘Forwarding’ or ‘transferring’ goods means sending them somewhere, as opposed to the customer taking the items with them, and may be required when: • The customer is an international traveller • They are ordered via mail order • A phone order is taken • It is an internet sale • A home delivery has to be made • It is an order for delivery to another store/business house.

Slide

Make arrangements to forward or transfer goods

Activities involved – will vary but can include:

- Obtaining forwarding/delivery details from customer
- Recording delivery details
- Contacting agents for transportation on behalf of the customer
- Obtaining payment from the customer for the delivery

(Continued)

Slide 85

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>85.</td><td>Trainer advises activities involved in forwarding/transferring goods can include:

Obtaining forwarding/delivery details from customer – this will/may require asking questions of the customer and:

Identifying delivery address
Determining best time for delivery
Arranging for alternate collection if person is not home

Recording delivery details – on a special form used for this purpose
Contacting agents for transportation on behalf of the customer – which is usually done:

By telephone
Via the internet

Obtaining payment from the customer for the delivery, as appropriate – this:

May occur on a ‘cost recovery’ basis only
May include a service fee for arranging the delivery/transfer
May not be required in some cases – such as:

Where customer is a VIP
Where selling price is advertised as including delivery.

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Slide

Slide No	Trainer Notes
86.	Trainer continues presenting activities involved in forwarding/transferring goods: • Advising customer in relation to relevant legal issues – as they apply to individual items, such as: ▪ Prohibition on the delivery of tobacco and alcohol to minors ▪ Ban on leaving tobacco and alcohol at unattended destinations • Forwarding items within the organisation – to customer pick-up bays or to other areas for collection by: ▪ Delivery service providers ▪ Customers • Insuring items prior to transit – this insurance may be: ▪ Taken out and paid for by the customer – as an optional extra when they make arrangements ▪ Standard procedure for the business when it sends out any item • Notifying customer when goods have been dispatched – this is organised/communicated at the time initial arrangements are made and is commonly done: ▪ By phone – via a person-to-person call or a text message ▪ By email • Following up with customers – to ensure items have arrived as anticipated.

Slide

Summary – Element 4

When wrapping and packing items:

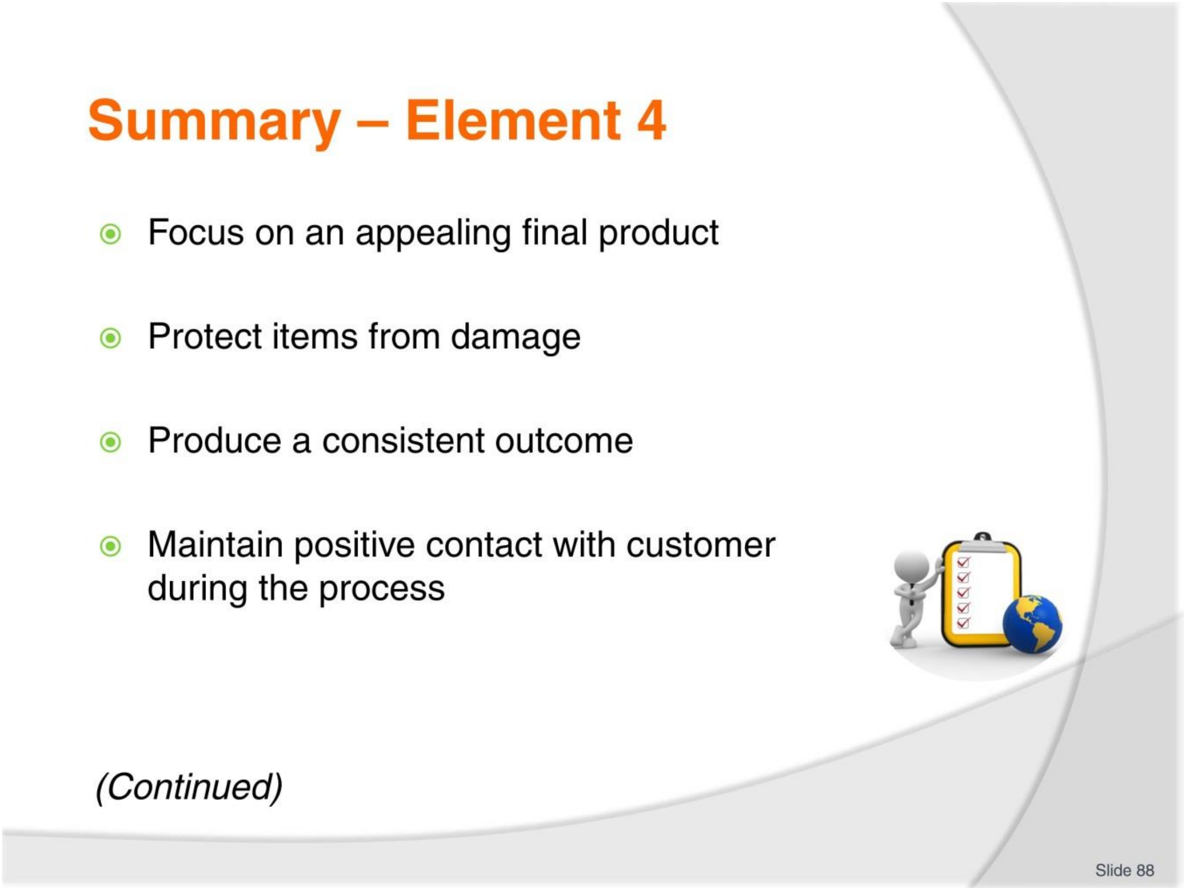
- Select appropriate materials to meet the individual needs of each product
- Use standard protocols and materials for most items
- Meet customer special requests where possible
- Work quickly

(Continued)

Slide 87

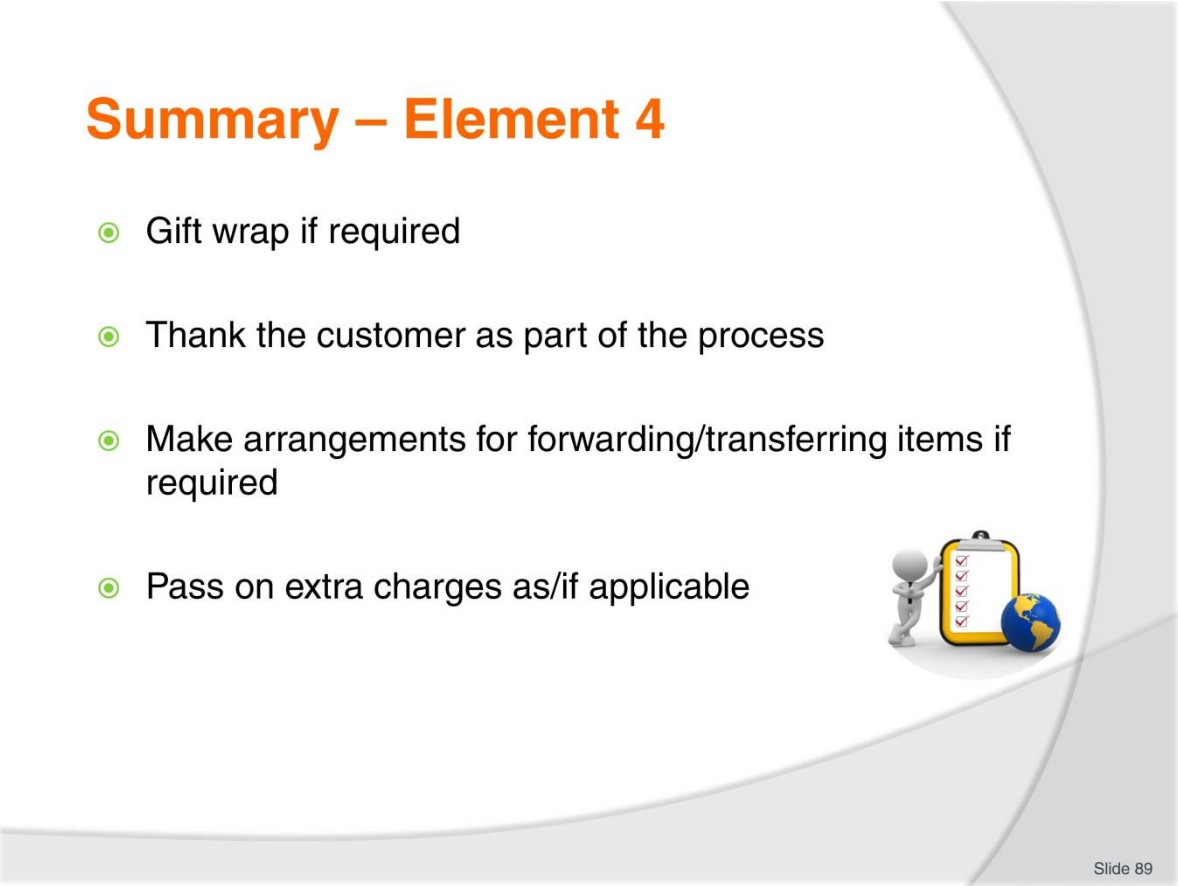
Slide No	Trainer Notes
87.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



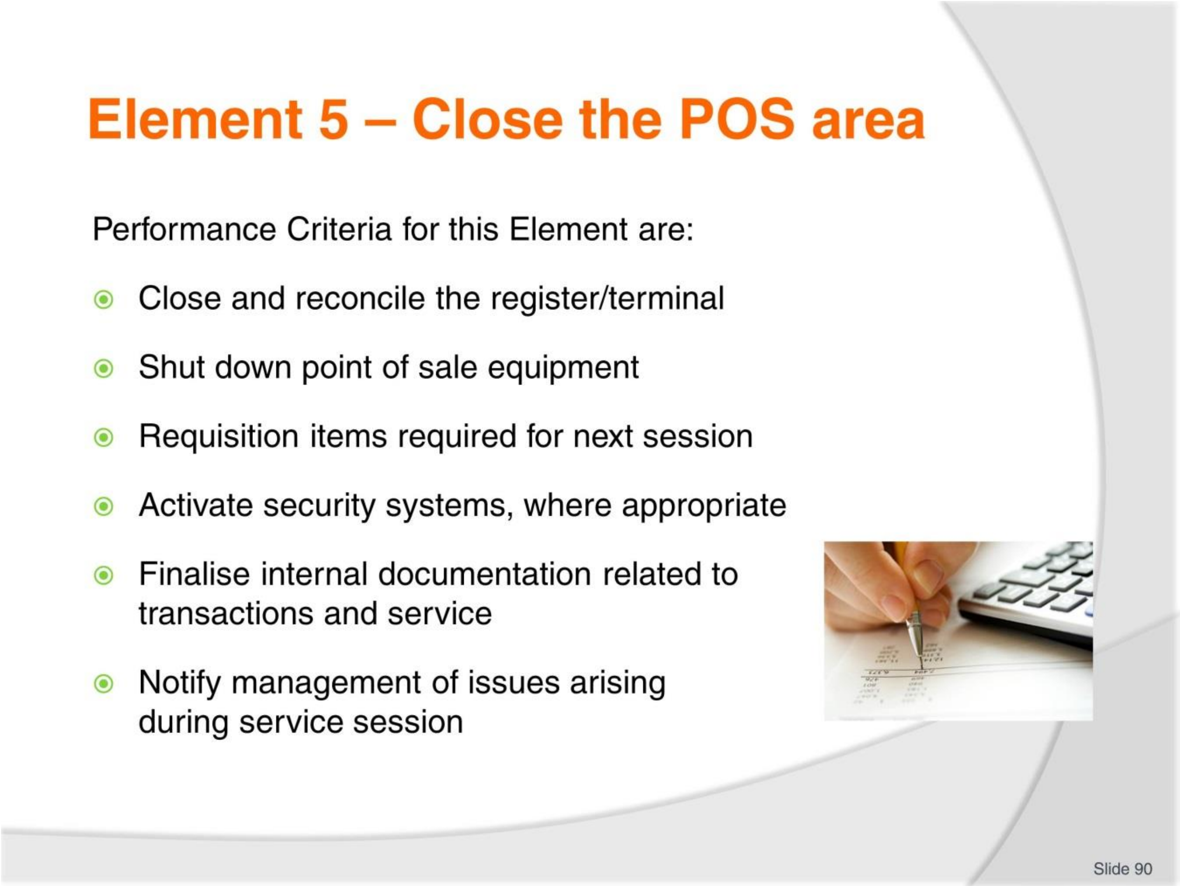
Slide No	Trainer Notes
88.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



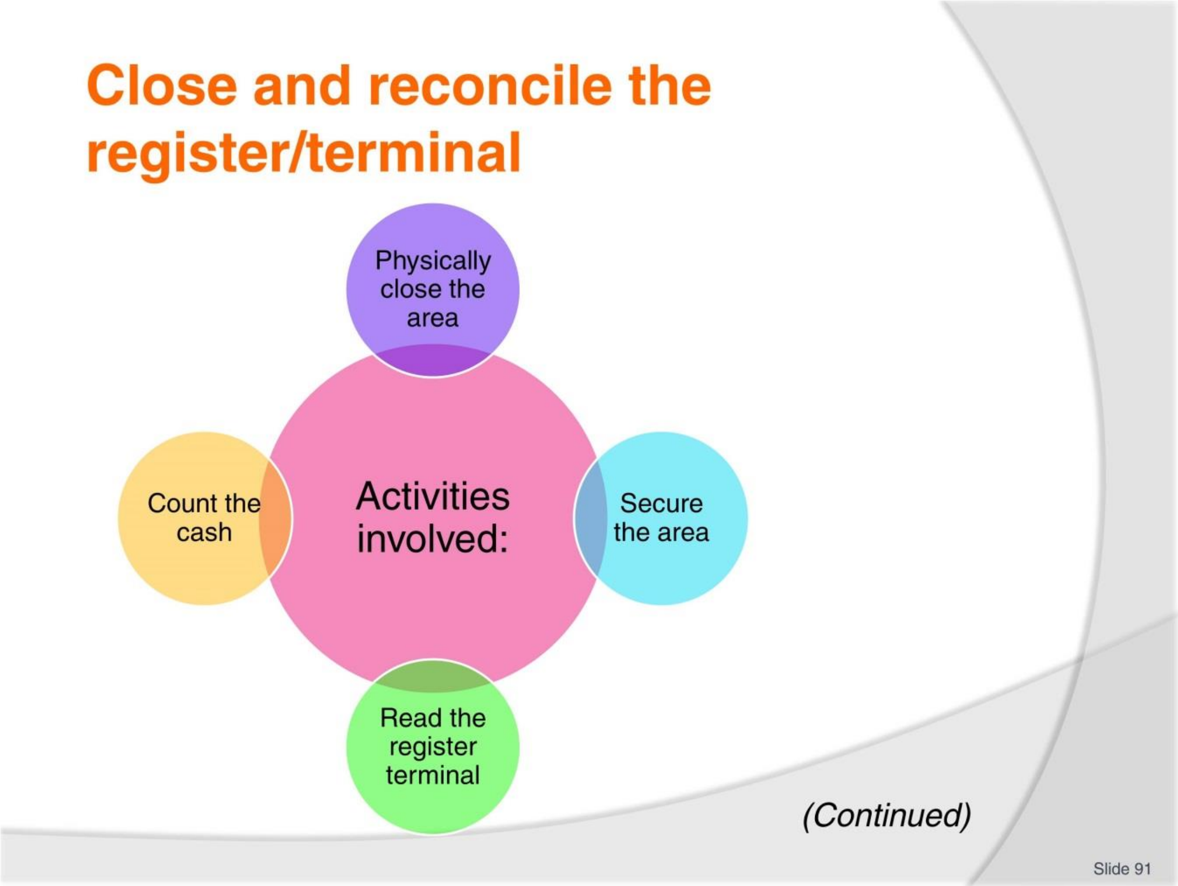
Slide No	Trainer Notes
89.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



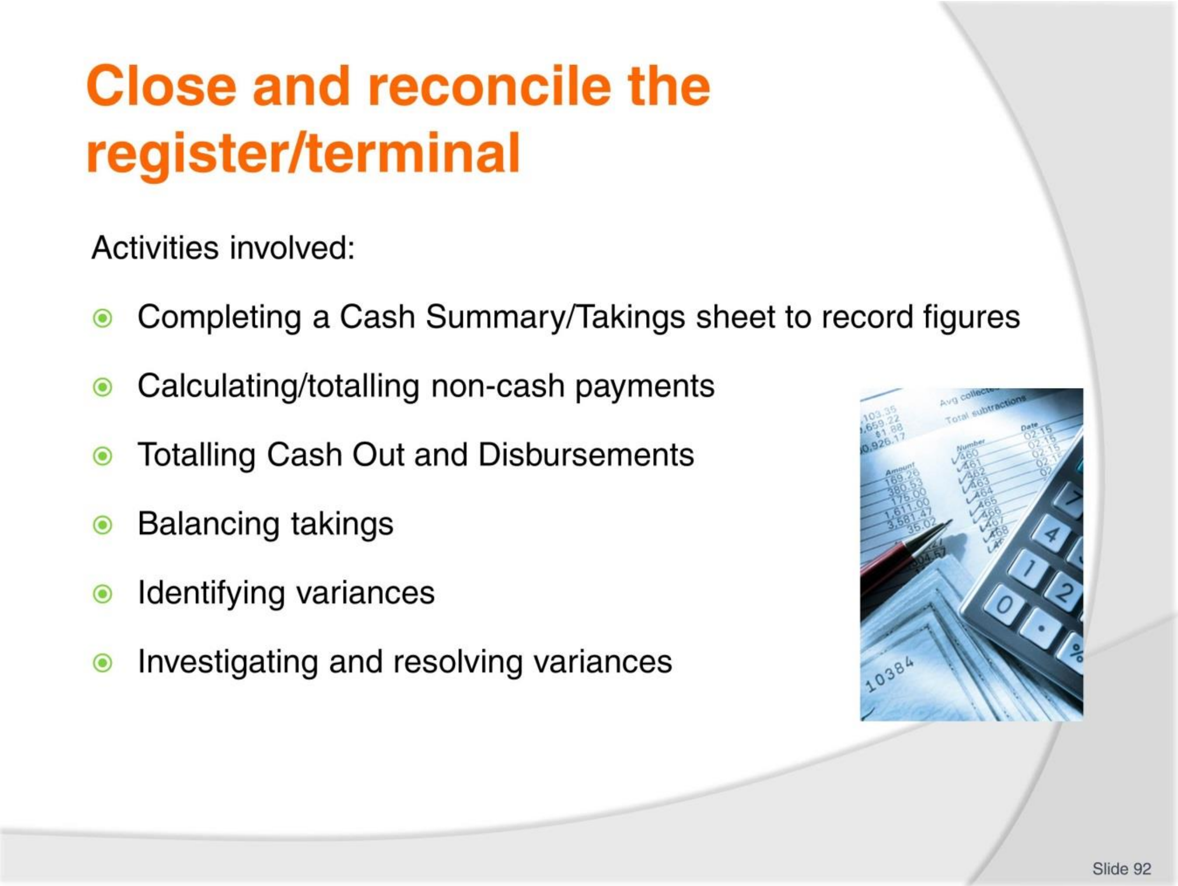
Slide No	Trainer Notes
90.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide. **Class Activity – General Discussion** Trainer leads a general class discussion by asking questions such as: • What are 'closing procedures'? • What is the importance of proper shut downs of POS areas?

Slide



Slide No	Trainer Notes
91.	Trainer explains activities in closing POS area and reconciling register/terminal: • Physically closing the area • Securing the area • Obtaining a reading from the register/terminal: ▪ Summary reading ▪ Final reading • Counting the cash: ▪ Coins first – starting with smallest denomination.

Slide



<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>92.</td><td>Trainer continues explaining activities in reconciling register/terminal:

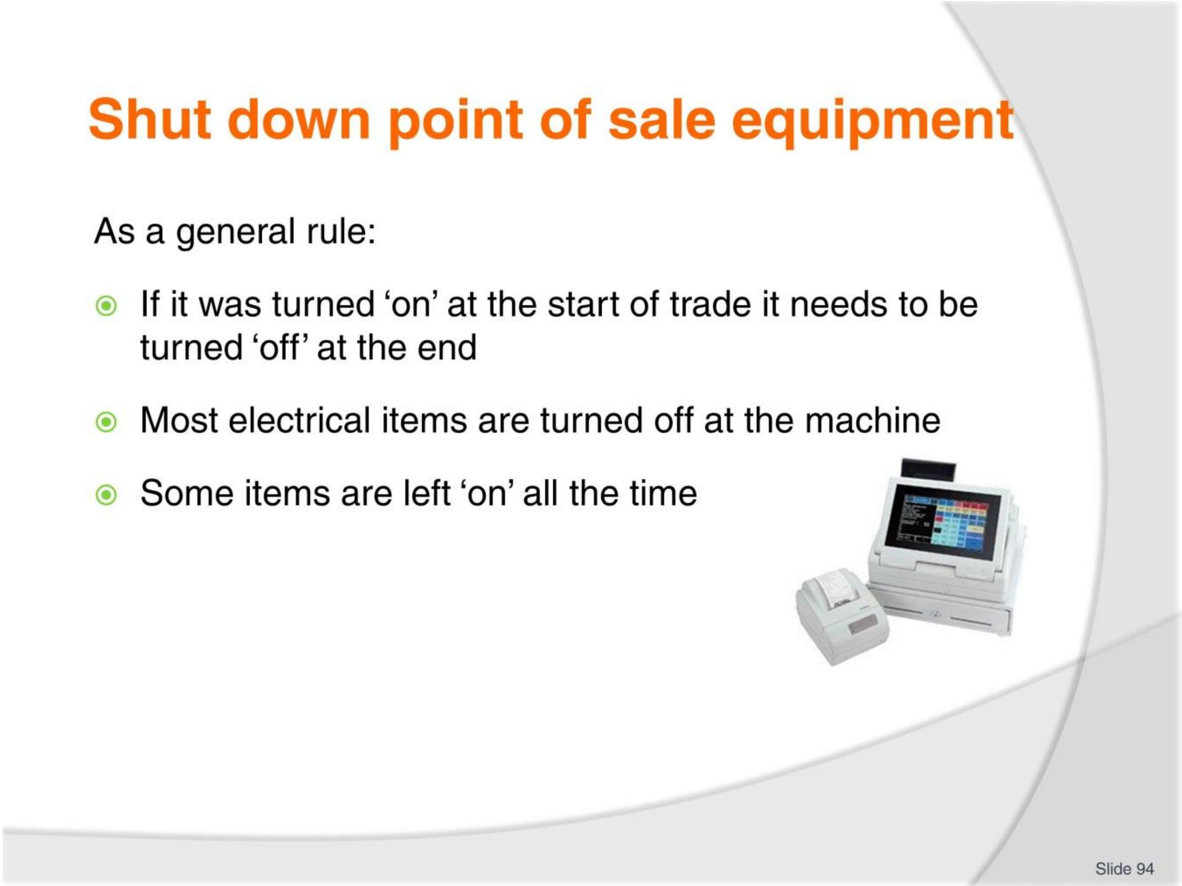
Using a Taking/Cash Summary sheet
Calculating and totalling non-cash payments
Totalling Cash Out and Disbursements
Balancing the takings
Identifying variances
Investigating and resolving variances – factoring in ‘acceptable error’.

Classroom Activity – Demonstration and Practical
Trainer demonstrates reconciliation procedures for register/terminal and provides opportunity for students to do the same.</td></tr>
</table>

Slide

Slide No	Trainer Notes
93.	Trainer advises shutting down can include closing down: • Equipment – the items behind the service counter/comprising the POS service area, such as: ▪ Registers/terminals ▪ Printers ▪ Weighing scales • Facilities – the items which support the service area and enhance the service experience for the customers, such as: ▪ Displays ▪ Vending machines ▪ Lights • Systems – including: ▪ Management-related systems such as: – Databases – Computerised reservation and information systems ▪ Communication systems ▪ Music/sound systems ▪ Air conditioning.

	Classroom Activity – Demonstration and Practical Trainer demonstrates shutting down items mentioned on slide.

Slide


Slide No	Trainer Notes
94.	Trainer notes as a general rule: • If an item was turned 'on' at the start of trade it will need to be turned 'off' at the end of trade • Most electrical items are turned off 'at the machine' – and not turned off 'at the wall' • Some items are left 'on' all the time – in accordance with manufacturer's instructions and/or internal preferences.

Slide

Shut down point of sale equipment

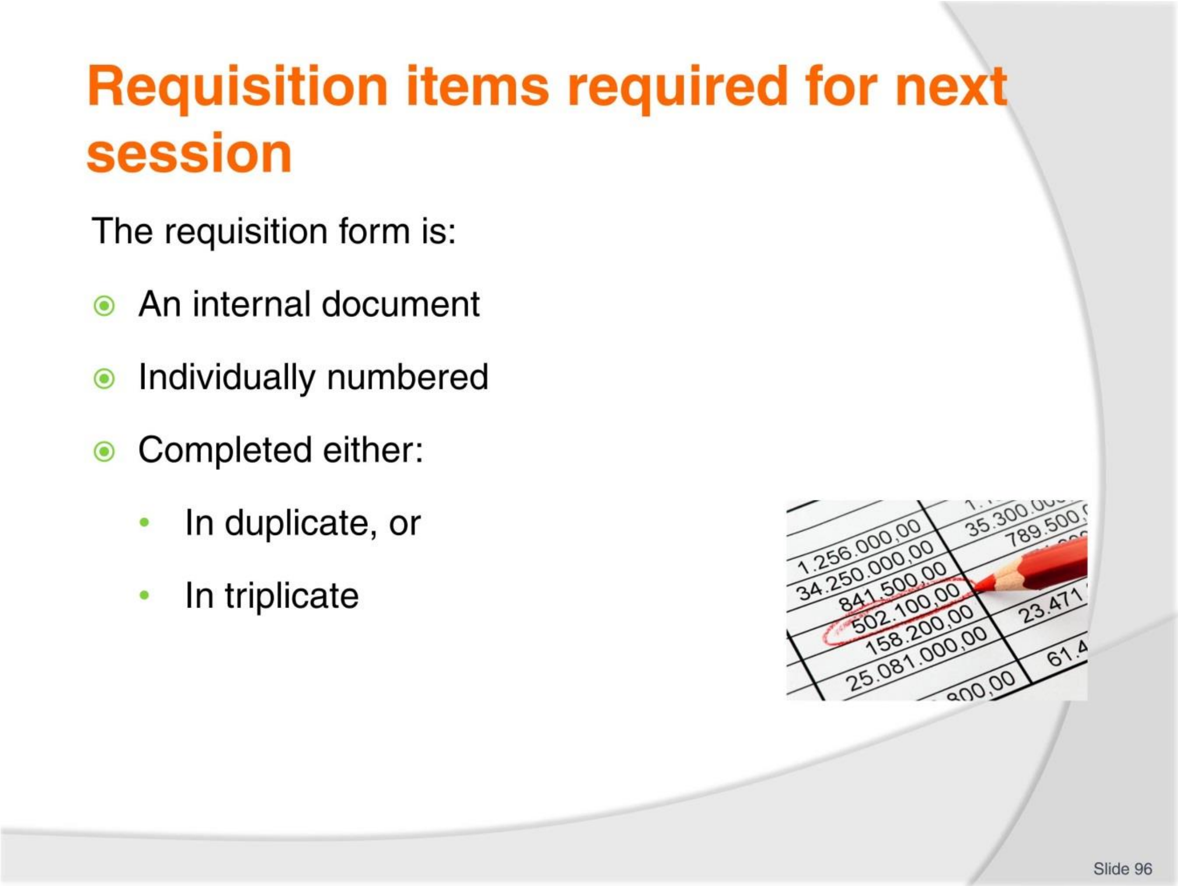
The following are usually undertaken at the same time as shut down:

- Inspections and checks of items
- Spot cleaning
- Tidying and making sure the area looks presentable

Slide 95

Slide No	Trainer Notes
95.	Trainer adds following are commonly undertaken at the same time equipment in the POS area is shut down: • Inspecting of items – to look for damage and check need for service/repairs • Spot cleaning – such as wiping down items • Tidying of the area – which involves: ▪ Discarding used/unwanted items and rubbish ▪ Putting things back in their original/designated location ▪ Stowing items in drawers and/or on shelves ▪ Clearing service areas/counters.

Slide



Slide No	Trainer Notes
96.	Trainer indicates the requisition form is: • An internal document • Individually numbered. Either: • A duplicate document – one copy is forwarded to the store and the second copy remains in the Requisition Book • A triplicate document – with the third copy being forwarded to Administration for processing.

Slide

Slide No	Trainer Notes
97.	Trainer adds: • It is completed by staff in order to requisition supplies to: ▪ Replace stock which has been used/sold ▪ Meet special requests/orders. When staff have completed a requisition form it may need to be signed by a supervisor to authorise processing of the items listed on the form.

Slide

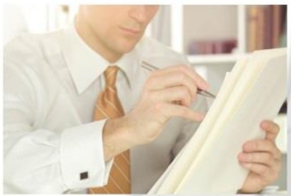
Slide No	Trainer Notes
98.	Trainer notes commonly: • The requisition form is completed at the same time every day for each department • Most requisitions are completed at the end-of-trade and forwarded to the management/the stores area – so items can be selected from the store and supplied to the department/POS area early the next day so it is waiting for staff when they arrive for work, and can put it away as part of opening procedures.

Slide

Requisition items required for next session

Contents/information on a requisition form includes:

- Date
- Name of department/area requesting the stock/items
- Description of stock/items
- Number/quantity required
- Name of person requesting stock



Slide 99

Slide No	Trainer Notes
99.	Trainer describes content of requisition form: • Date • Name of department/location requesting the stock • Description of stock – giving sufficient details to enable store personnel to select and supply the correct items required • Number/amount/quantity required • Name of person requesting stock/items. **Classroom Activity – Handout and Demonstration** Trainer distributes and discusses samples of requisition form and shows students how to complete them to order stock/items.

Slide

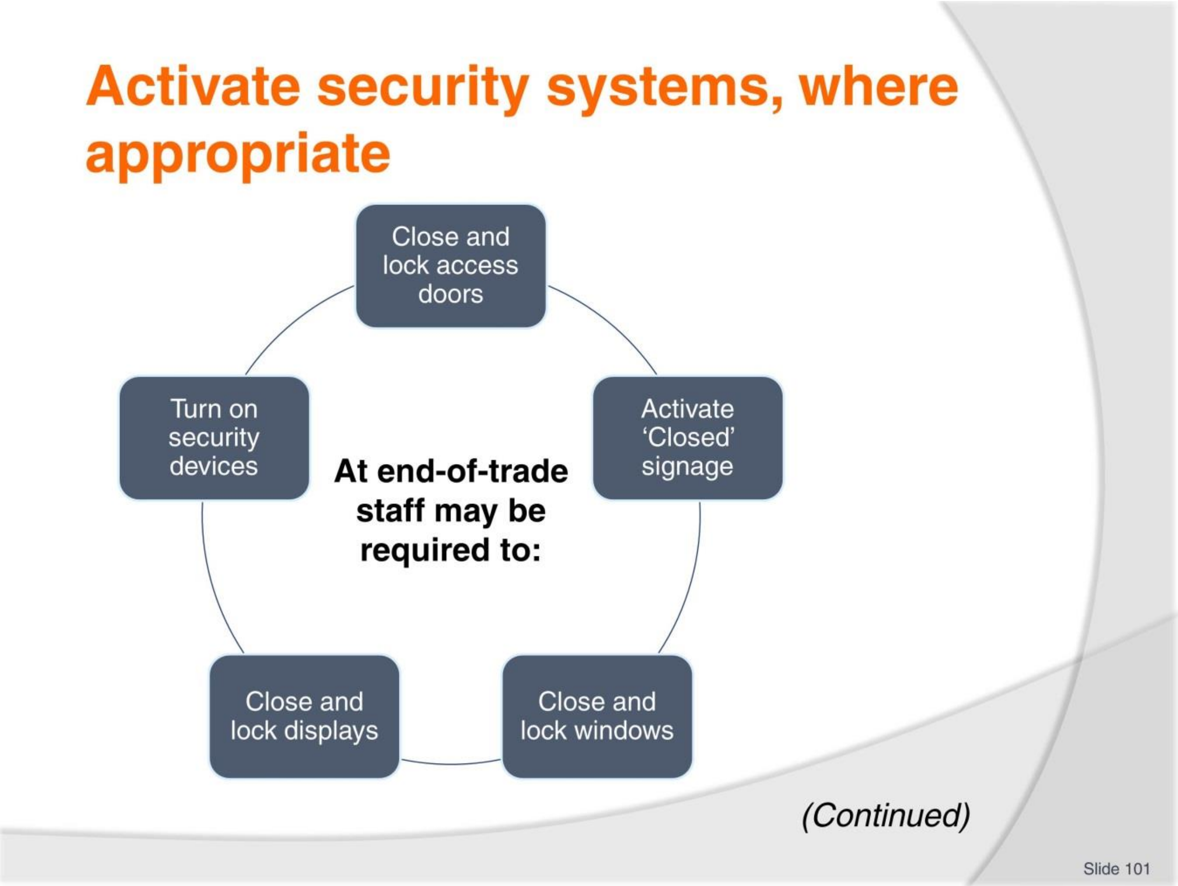
Requisition items required for next session

In some cases:

- Staff may be required to include a Code Number for every item they order
- A 'soft copy' version may be used rather than a hard copy

Slide 100

Slide No	Trainer Notes
100.	Trainer suggests in some cases: • There may also be a requirement to add a code for each item – taken from an internal stock management/control database • An electronic version (instead of a hard copy) may be required.

Slide


Slide No	Trainer Notes

101.	Trainer informs POS staff many have responsibility for the following activities in order to secure the area at the end-of-trade:
	• Closing access doors – and locking them
	• Activating 'closed' signs
	• Closing and locking windows – in the service area
	• Closing and locking displays and showcases
	• Turning on security devices – such as:
	  ▪ Alarms
	  ▪ CCTV cameras.

Slide

Activate security systems, where appropriate

At end-of-trade staff may be required to:

- Activate alarms
- Check security systems
- Conduct inspections/checks of the area
- Work with security staff
- Notify nominated others when security protocols have been completed

Slide 102

Slide No	Trainer Notes
102.	Trainer continues identifying end-of-trade security tasks:

- Activating alarms – which may require:
  - Inputting a code
  - Turning/keying them 'on'
- Checking operational status of security system – to verify it is working as expected and providing the expected protection and surveillance
- Conducting physical inspection of the sales/POS area – to ensure no people remain on the premises after lock up. Checks should embrace:
  - Public areas such as rest rooms/toilets and waiting rooms
  - Back-of-house areas
- Working in conjunction/cooperation with dedicated security staff – which may include:
  - Passing on reports of suspicious persons/circumstances
  - Communicating identified instances of theft/shoplifting
- Notifying security/management when required security protocols have been completed or initiated.

Slide

Finalise internal documentation related to transactions and service

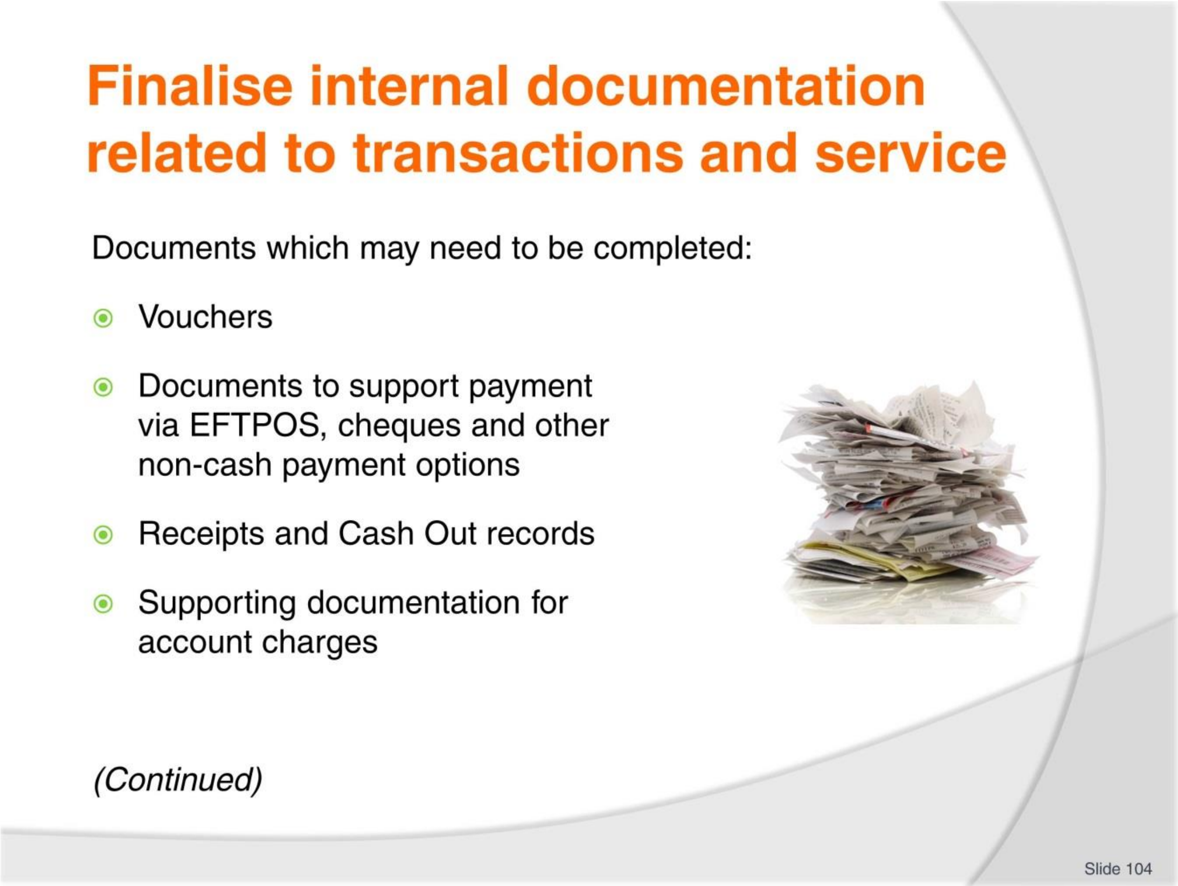
Completing documents may mean/require:

- Finishing off work on documents that has already begun
- Checking work already done
- Initiating records/paperwork

Slide 103

Slide No	Trainer Notes
103.	Trainer defines 'Completing documents' as possibly meaning: • Finalising work which has already been started on records/documents • Checking work already done/details provided • Initiating records/paperwork – filling out new documents 'from scratch'.

Slide



Slide No	Trainer Notes
104.	Trainer indicates there can be a need to complete the following documents at the end of trade: • Vouchers accepted as payment for goods/services – in practical terms these vouchers are the same as cash and need to be completed to enable management to calculate the actual financial performance of sections of the business • Documentation to support other non-cash transactions – such as: ▪ Payments by cheques • EFTPOS transactions • Receipts and Cash Out documents/records – to support cash payments made from the register/terminal • Documentation signed by customers – to support posting of charges to guest/customer accounts. **Classroom Activity – Handout and Demonstration** Trainer distributes and discusses samples of documentation identified on slide and shows students how to complete them as part of end-of-trade activities.

Slide

Finalise internal documentation related to transactions and service

- Cash Summary/Taking sheet
- Change request form
- Refunds, returns and exchanges documentation
- Incident reports
- Accident/injury reports

Slide 105

Slide No	Trainer Notes
105.	Trainer continues identifying documents which may need to be completed: • Cash summary and Takings sheets – to documents revenue for the day from the register/terminal showing: ▪ Breakdown of sales ▪ Overview of methods of payment ▪ Variances • Change request forms – ordering change required to support/enable cash sales/transactions • Refund, return and exchange documentation – as identified in previous notes. If events occur during trade there can also be a need to complete: • Incident reports • Accident and injury reports. **Classroom Activity – Handout and Demonstration** Trainer distributes and discusses samples of documentation identified on slide and shows students how to complete them as part of end-of-trade activities.

Slide


Slide No	Trainer Notes
106.	Trainer introduces concept of staff de-briefings stating: • At the end-of-trade many businesses conduct a de-briefing session • This is a short (five minutes) meeting between supervisor/manager/owner and operational staff.

Slide


Slide No	Trainer Notes
107.	Trainer instructs the aims of staff de-briefings are to: • Provide an opportunity to raise problems/issues with management • Give management an opportunity to communicate with workers • Share information • Finalise unfinished business.

Slide

Notify management of issues arising during service session

Topics which may be addressed at de-briefings:

- Anything – there is no limit
- Disputes with customers which took place during the session
- Suspicious persons/events
- Equipment/system failures or malfunctions

(Continued)

Slide 108

Slide No	Trainer Notes

108.	Trainer informs there is really no limit/restriction on what can be discussed at staff de-briefings but they commonly embrace:
	• Disputes which took place with customers – and details of:
	  ▪ How they arose
	  ▪ How they were resolved
	  ▪ Lessons learned for future reference
	• Suspicious persons or events – with:
	  ▪ Description/s of person/s
	  ▪ Reasons for concern
	• Instances where equipment or systems malfunctioned or failed to function as required – so:
	  ▪ Replacement items can be organised
	  ▪ Other suitable remedial action can be taken.

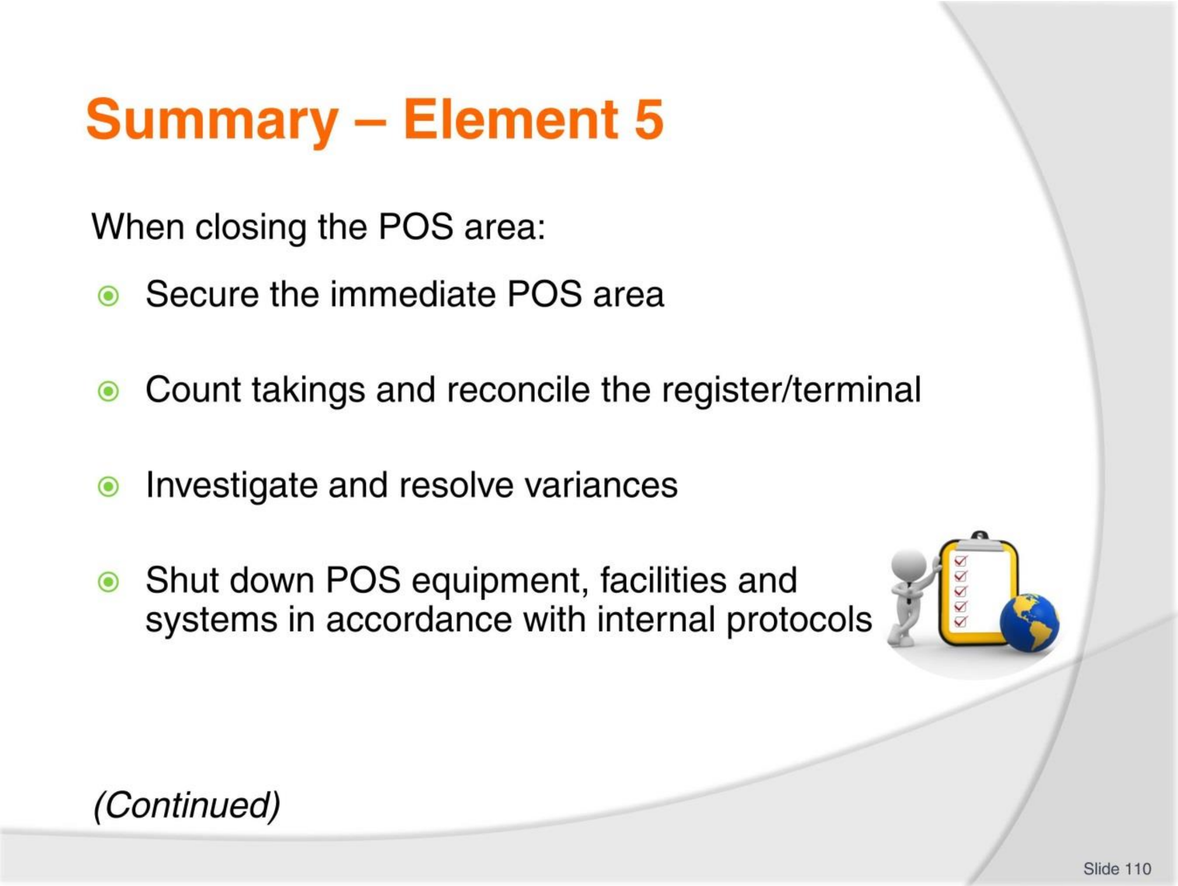
Slide

Slide No	Trainer Notes
109.	Trainer continues identifying possible topics for discussion at staff de-briefings:

- Instances where SOPs were compromised – in terms of:
  - Service delivery
  - Customer and/or staff safety
  - Business, property, stock or cash security
- Situations where outside assistance or authorities were involved/had to be summoned – such as:
  - Theft and attempted theft/shoplifting
  - Assaults and/or threatening language and/or behaviour
  - Any emergency situations
- Input made by customers – with reference to:
  - Solicited and unsolicited feedback
  - Ideas for new/revised service provisions
  - Suggestions for new/revised products.

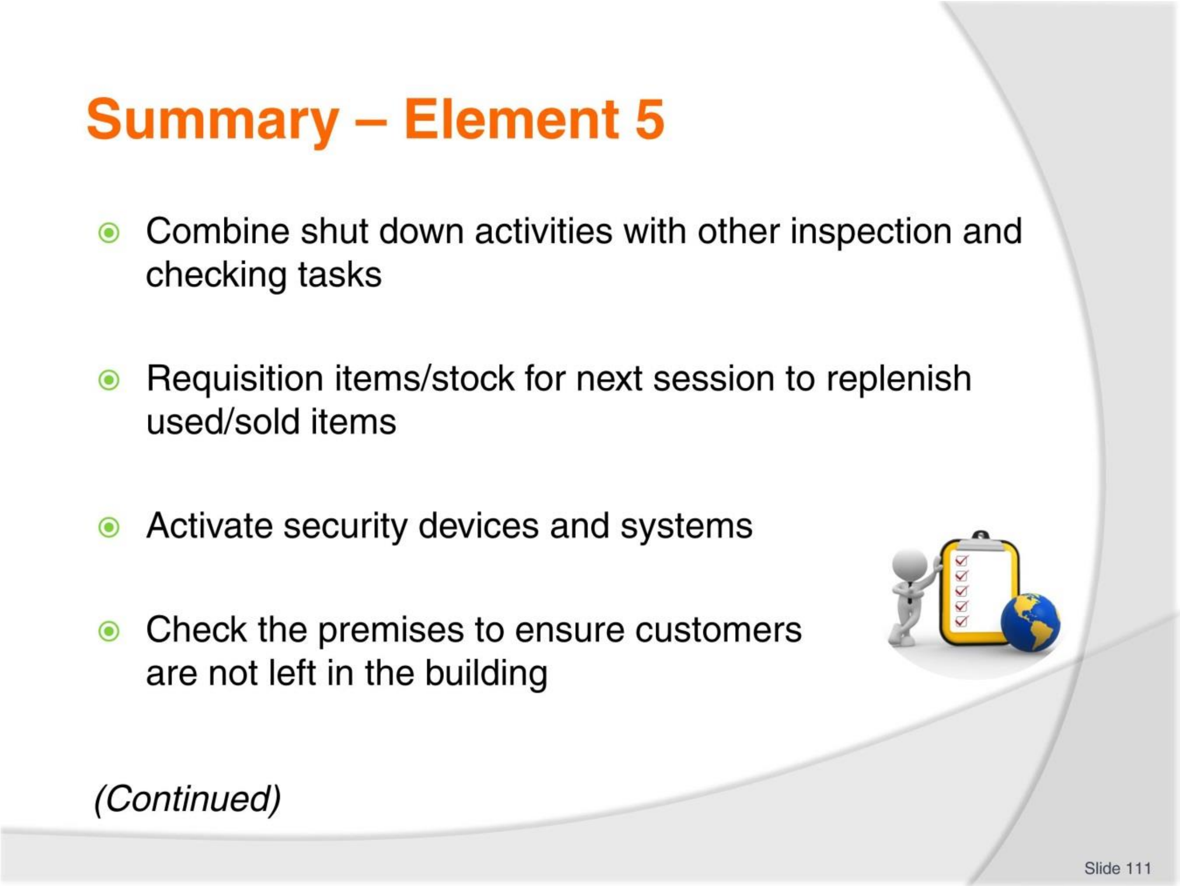
	Classroom Activity – Excursion Trainer arranges for visit to a suitable business so students can: • Talk to staff and management • View facilities and operations • Watch a close down of the POS area • Observe cash register reconciliation and staff de-briefing.

Slide



Slide No	Trainer Notes
110.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



Slide No	Trainer Notes
111.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Summary – Element 5

- Close and lock doors and windows
- Complete relevant paperwork to reflect/record the session and all transactions
- Participate actively in staff de-briefing sessions at end-of-trade

Slide 112

Slide No	Trainer Notes
112.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required. Trainer thanks trainees for their attention and encourages them to apply course content as required in their workplace activities.

Recommended training equipment

Examples of POS equipment, facilities and systems such as:

- Cash register/terminal
- Scanners
- Electronic labelling equipment
- Electronic funds transfer point of sale (EFTPOS) facilities
- Portable data entry equipment
- Internal cash transfer systems
- Weighing machines
- Internal communication systems
- Security systems
- Wrapping and packing equipment including paper and plastic wrapping equipment, string dispensers, tape, bubble wrap, gift wrapping, tissue paper and plastic film, Styrofoam spacers, cartons, boxes and crates, built boxes and containers, bags and pouches, tubing, hat boxes and suit bags, bottle bags, envelopes, mailers.

Sample POS documents relating to:

- Sales
- Refunds
- Returns
- Exchanges
- Lay-bys
- Complaints
- Receipts
- Invoices
- Terms and Conditions for sales of products and services
- Checklists
- Special requests/special orders
- Advance deposits documentation
- Policies and procedures relating to sales/selling/operating a POS area
- Vouchers and coupons
- Change request forms
- Wallets for holding tickets and travel documentation
- Cash transfer sheets
- Discarded or un-useable stock sheets
- Stock transfer sheets

- Cash Summary/Reconciliation Sheet
- Cash Out/Cash Paid Out slip
- Over-ring slip
- Requisition forms
- Incident reports.

Cash for use in cash registers to practice cash handling skills, the processing of payments and giving change to customers.

Instructions for Trainers for using PowerPoint – Presenter View

Connect your laptop or computer to your projector equipment as per manufacturers' instructions.

In PowerPoint, on the **Slide Show** menu, click **Setup Show**.

Under Multiple monitors, select the Show Presenter View check box.

In the **Display slide show** on list, click the monitor you want the slide show presentation to appear on.

Source: http://office.microsoft.com

Note:

In Presenter View:

You see your notes and have full control of the presentation

Your trainees only see the slide projected on to the screen

More Information

You can obtain more information on how to use PowerPoint from the Microsoft Online Help Centre, available at:
http://office.microsoft.com/training/training.aspx?AssetID=RC011298761033

Note Regarding Currency of URLs

Please note that where references have been made to URLs in these training resources trainers will need to verify that the resource or document referred to is still current on the internet. Trainers should endeavour, where possible, to source similar alternative examples of material where it is found that either the website or the document in question is no longer available online.

Appendix – ASEAN acronyms

AADCP	ASEAN – Australia Development Cooperation Program
ACCSTP	ASEAN Common Competency Standards for Tourism Professionals
AEC	ASEAN Economic Community
AMS	ASEAN Member States
ASEAN	Association of Southeast Asian Nations
ASEC	ASEAN Secretariat
ATM	ASEAN Tourism Ministers
ATPMC	ASEAN Tourism Professionals Monitoring Committee
ATPRS	ASEAN Tourism Professional Registration System
ATFTMD	ASEAN Task Force on Tourism Manpower Development
CATC	Common ASEAN Tourism Curriculum
MRA	Mutual Recognition Arrangement
MTCO	Mekong Tourism Coordinating office
NTO	National Tourism Organisation
NTPB	National Tourism Professional Board
RQFSRS	Regional Qualifications Framework and Skills Recognition System
TPCB	Tourism Professional Certification Board

William Angliss Institute

Specialist centre for foods, tourism & hospitality

asean

Australian Aid