



Apply point of sale handling techniques

D2.TCS.CL5.01

Trainee Manual



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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

All text is produced by William Angliss Institute of TAFE for the ASEAN Project on “Toolbox Development for Front Office, Food and Beverage Services and Food Production Divisions”.

This publication is supported by the Australian Government’s aid program through the ASEAN-Australia Development Cooperation Program Phase II (AADCP II).

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File name: TM_Apply_point_of_sale_handling_techniques_220415



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Introduction to trainee manual

To the Trainee

Congratulations on joining this course. This Trainee Manual is one part of a 'toolbox' which is a resource provided to trainees, trainers and assessors to help you become competent in various areas of your work.

The 'toolbox' consists of three elements:

- A Trainee Manual for you to read and study at home or in class
- A Trainer Guide with Power Point slides to help your Trainer explain the content of the training material and provide class activities to help with practice
- An Assessment Manual which provides your Assessor with oral and written questions and other assessment tasks to establish whether or not you have achieved competency.

The first thing you may notice is that this training program and the information you find in the Trainee Manual seems different to the textbooks you have used previously. This is because the method of instruction and examination is different. The method used is called Competency based training (CBT) and Competency based assessment (CBA). CBT and CBA is the training and assessment system chosen by ASEAN (Association of South-East Asian Nations) to train people to work in the tourism and hospitality industry throughout all the ASEAN member states.

What is the CBT and CBA system and why has it been adopted by ASEAN?

CBT is a way of training that concentrates on what a worker can do or is required to do at work. The aim of the training is to enable trainees to perform tasks and duties at a standard expected by employers. CBT seeks to develop the skills, knowledge and attitudes (or recognise the ones the trainee already possesses) to achieve the required competency standard. ASEAN has adopted the CBT/CBA training system as it is able to produce the type of worker that industry is looking for and this therefore increases trainee chances of obtaining employment.

CBA involves collecting evidence and making a judgement of the extent to which a worker can perform his/her duties at the required competency standard. Where a trainee can already demonstrate a degree of competency, either due to prior training or work experience, a process of 'Recognition of Prior Learning' (RPL) is available to trainees to recognise this. Please speak to your trainer about RPL if you think this applies to you.

What is a competency standard?

Competency standards are descriptions of the skills and knowledge required to perform a task or activity at the level of a required standard.

242 competency standards for the tourism and hospitality industries throughout the ASEAN region have been developed to cover all the knowledge, skills and attitudes required to work in the following occupational areas:

- Housekeeping
- Food Production
- Food and Beverage Service
- Front Office

- Travel Agencies
- Tour Operations.

All of these competency standards are available for you to look at. In fact you will find a summary of each one at the beginning of each Trainee Manual under the heading 'Unit Descriptor'. The unit descriptor describes the content of the unit you will be studying in the Trainee Manual and provides a table of contents which are divided up into 'Elements' and 'Performance Criteria'. An element is a description of one aspect of what has to be achieved in the workplace. The 'Performance Criteria' below each element details the level of performance that needs to be demonstrated to be declared competent.

There are other components of the competency standard:

- *Unit Title*: statement about what is to be done in the workplace
- *Unit Number*: unique number identifying the particular competency
- *Nominal hours*: number of classroom or practical hours usually needed to complete the competency. We call them 'nominal' hours because they can vary e.g. sometimes it will take an individual less time to complete a unit of competency because he/she has prior knowledge or work experience in that area.

The final heading you will see before you start reading the Trainee Manual is the 'Assessment Matrix'. Competency based assessment requires trainees to be assessed in at least 2 – 3 different ways, one of which must be practical. This section outlines three ways assessment can be carried out and includes work projects, written questions and oral questions. The matrix is designed to show you which performance criteria will be assessed and how they will be assessed. Your trainer and/or assessor may also use other assessment methods including 'Observation Checklist' and 'Third Party Statement'. An observation checklist is a way of recording how you perform at work and a third party statement is a statement by a supervisor or employer about the degree of competence they believe you have achieved. This can be based on observing your workplace performance, inspecting your work or gaining feedback from fellow workers.

Your trainer and/or assessor may use other methods to assess you such as:

- Journals
- Oral presentations
- Role plays
- Log books
- Group projects
- Practical demonstrations.

Remember your trainer is there to help you succeed and become competent. Please feel free to ask him or her for more explanation of what you have just read and of what is expected from you and best wishes for your future studies and future career in tourism and hospitality.

Unit descriptor

Apply point of sale handling techniques

This unit deals with the skills and knowledge required to Apply point of sale handling techniques in a range of settings within the hotel and travel industries workplace context.

Unit Code:

D2.TCS.CL5.01

Nominal Hours:

30 hours

Element 1: Prepare point of sale for service

Performance Criteria

- 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

Performance Criteria

- 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

Element 3: Conduct point of sale transactions

Performance Criteria

- 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

Performance Criteria

- 4.1 Select appropriate wrapping and packaging material for goods
- 4.2 Wrap and pack items purchased by customers
- 4.3 Make arrangements to forward or transfer goods in accordance with customer requirements

Element 5: Close the point of sale area

Performance Criteria

- 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

Assessment matrix

Showing mapping of Performance Criteria against Work Projects, Written Questions and Oral Questions

The Assessment Matrix indicates three of the most common assessment activities your Assessor may use to assess your understanding of the content of this manual and your performance - Work Projects, Written Questions and Oral Questions. It also indicates where you can find the subject content related to these assessment activities in the Trainee Manual (i.e. under which element or performance criteria). As explained in the Introduction, however, the assessors are free to choose which assessment activities are most suitable to best capture evidence of competency as they deem appropriate for individual students.

		Work Projects	Written Questions	Oral Questions
Element 1: Prepare point of sale for service				
1.1	Identify point of sale equipment, facilities and systems	1.1	1, 2	1
1.2	Prepare point of sale equipment, facilities and systems for use	1.1	3, 4	2
1.3	Open the point of sale area for service	1.1	5, 6	3
Element 2: Operate point of sale equipment				
2.1	Operate point of sale equipment, facilities and system according to manufacturer's instructions	2.1	7, 8	4
2.2	Operate point of sale wrapping and packing equipment and use wrapping and packing materials according to manufacturer's instructions and house policies	2.1	9, 10	5
Element 3: Conduct point of sale transactions				
3.1	Process sales in accordance with customer wishes	3.1	11, 12	6
3.2	Accept payment for goods and services purchased	3.1	13, 14	6
3.3	Establish rapport with customers during the service	3.1	15, 16	7
3.4	Optimise sales for each transaction, as appropriate	3.1	17, 18	8
3.5	Process returns, refunds and exchanges	3.1	19, 20	9

		Work Projects	Written Questions	Oral Questions
3.6	Create and maintain efficient service levels at point of sale area	3.1	21	10
3.7	Conduct bag searches	3.1	22	11
3.8	Complete point of sale documentation to accompany transactions	3.1	23, 24	6 & 9
Element 4: Wrap and pack items				
4.1	Select appropriate wrapping and packaging material for goods	4.1	25	5
4.2	Wrap and pack items purchased by customers	4.1	26	5
4.3	Make arrangements to forward or transfer goods in accordance with customer requirements	4.1	27, 28	12
Element 5: Close the point of sale area				
5.1	Close and reconcile the register/terminal	5.1	29 – 32	13
5.2	Shut down point of sale equipment	5.1	33, 34	14
5.3	Requisition items required for next session	5.1	35, 36	15
5.4	Activate security systems, where appropriate	5.1	37	16
5.5	Finalise internal documentation related to transactions and service	5.1	38	17
5.6	Notify management of issues arising during service session	5.1	39, 40	18

Glossary

Term	Explanation
CCTV	Closed Circuit Television
Cash float	Money placed into register at the start of trade in specified amounts and denominations to allow/facilitate cash transactions
Closing procedures	SOPs carried out at end-of-trade
EFTPOS	Electronic funds transfer point of sale
Honorific	A person's title – Mr, Mrs, Dr and similar
ID	Identification
MEPS	Malaysian Electronic Payment System
NETS	Network for Electronic Transfers
Non-cash payment	Payment in any form other than cash such as in the form of cheques, card, vouchers, account
Opening procedures	SOPs carried out to prepare the business for trade
PA system	Public Address system
PDET	Portable Data Entry Terminal
PDT	Portable Data Terminal
PIN	Personal Identification Number
PLU	Price/Product Look Up
POS	Point-Of-Sale
Requisition form	Internal requesting/ordering stock by type and quantity for the POS area
VIP	Very Important Person

Element 1:

Prepare point of sale for service

1.1 Identify point of sale equipment, facilities and systems

Introduction

Identifying the equipment, facilities and systems in the POS area is the first step in preparing requisites for service.

This section identifies examples of the above giving an overview of its role and lists examples of supporting documentation.

Context

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.



Examples of POS equipment, facilities and systems

Point of sale 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.

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.

Weighing machines

These are used to weigh product in order to allow the sales price to be calculated so the customer can determine/be told of the cost and the sale can then be processed.

Weighing machines may be stand-alone units, may contain a print-out facility whereby a price-sticker is printed, or can be integrated into the POS terminal such that the price is automatically sent to the register when the item is weighed.

Internal communication systems

Most operations (but not all) have some way POS staff can communicate with others in the workplace.

The system may be a PA system or a hard-wired, telephone-based option.

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.

Supporting documentation

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.

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.



- 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.



1.2 Prepare point of sale equipment, facilities and systems for use

Introduction

A standard and ongoing requirement for all POS areas is to prepare the equipment, facilities and systems for use.

This section identifies and describes the standard and practical activities staff can be expected to undertake to prepare items for opening.

Opening requirements

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.



Following 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.

Complying 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.



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.

1.3 Open the point of sale area for service

Introduction

When all equipment, facilities and systems have been prepared the POS area can be opened for sales/service.

This section identifies the basic requirements for opening for service.



Opening the area

Always 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.

Standard activities

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
- 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.



Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

1.1 Prepare a POS area for service providing (real-time or video/photographic) evidence you can:

- Identify the equipment, facilities and systems which need to be prepared and readied for use.

Items must include:

- Cash register/terminal
 - Scanner of some type
 - EFTPOS facilities
 - Make the identified equipment, facilities and systems ready for service
 - Take appropriate action to open the area for service.
-

Summary

Prepare point of sale for service

When preparing point of sale for service:

- Identify equipment, facilities and systems to be initiated/turned on
- Implement protocols as prescribed by internal training, policies and SOPs
- Adhere to manufacturer's instructions
- Ensure required documentation is in place
- Verify presence of wrapping and packaging materials and equipment
- Check the service area from the customer's side of the counter
- Make sure registers/terminals are prepared and ready for processing transactions
- Obtain cash, change and floats
- Replenish depleted supplies
- Participate in staff briefings
- Confirm operational readiness with supervisor
- Open the business/doors
- Turn on and adjust lights, music/sound and air conditioning.

Element 2: Operate point of sale equipment

2.1 Operate point of sale equipment, facilities and system according to manufacturer's instructions

Introduction

When the POS area has been opened the equipment, facilities and systems will need to be operated.

This section gives an overview of what is required when operating many of the items used in the POS area.

General requirements

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.



Using registers/terminals

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

- 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
- 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.



Using scanners

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

- 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.



These are relatively simple to operate and generally require:

- 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.

Using electronic labelling equipment

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.

Different bar code printers will support various bar codes, with options including:

UPC	EAN8/13	EAN128
Code 39	Code 93	MS1
125	M25	UCC128
Code 128	Codeabar	Maxicode

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.

Using EFTPOS facilities

This relates to the processing of credit card and debit card sales.

The focus of 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.



Using portable data entry equipment

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.

Using cash transfer systems

These systems may be operated using a:

- Manual system, or
- Pneumatic system.

The systems are not commonly used in travel and tour businesses but can be used to:

- Obtain change – a 'Change Request' form will need to be completed identifying:
 - Name/number of register
 - Date
 - Name of person requesting change
 - Money forwarded in order to obtain change
 - Type and amount of change required – by denomination and value
- Forward cash from point of sale registers to secure central office for processing and banking.

A record of all cash taken from the register must be written out and kept in the cash drawer to assist with the reconciliation process at the end-of-trade.

Using weighing machines

Weighing machines are not commonly found in travel and tourism businesses being more commonly found in other retail outlets.

Use of these items will focus on operating electronic or other scales, including stand-alone scales and scales integrated with terminal/register.

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
- 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.

Using internal communication

There may be a need in larger workplaces for POS staff to use internal communication devices and systems to:

- Using the and/or 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.



Using security systems and devices

All POS staff have an obligation to ensure the security of stock and cash.

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.



2.2 Operate point of sale wrapping and packing equipment and use wrapping and packing materials according to manufacturer's instructions and house policies

Introduction

Where the organisation uses packing and wrapping equipment at its POS area there is a need to be able to operate it efficiently and effectively.

This section identifies items of wrapping and packing equipment and materials and forms the basis for Element 4 which discusses wrapping and packing in more detail.

Wrapping and packing equipment

It is possible the workplace may feature one or more of the following items which need to be used for wrapping and packing items which have been sold:

- Paper wrapping – which may involve:
 - Paper rollers/counter roll holders
 - Paper
 - 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.



Wrapping and packing materials

Wrapping and packing materials used will always reflect the products sold.

Not all operators will use the materials shown below – many of them are used only by other retail outlets and/or operators who sell bulk quantities to other organisations.

The options present in the workplace *may* include:

- 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
- 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.



Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

2.1 Operate a POS area delivering customer service providing (real-time or video/photographic) evidence you can:

- Operate one POS systems
 - Use two POS facilities
 - Operate two items of POS equipment.
-

Summary

Operate point of sale equipment

When operating point of sale equipment:

- Follow manufacturer's instructions
- Adhere to internal protocols
- Obtain and comply with on-the-job training
- Prepare every item as required
- Test run items/systems as required
- Ask more experienced staff for their help
- Be prepared to read User Manuals
- Check supplies of wrapping and packing materials.

Element 3:

Conduct point of sale transactions

3.1 Process sales in accordance with customer wishes

Introduction

When working in a POS area all sales must be processed in accordance with customer wishes.

This section identifies and addresses actions commonly involved in completing a sales transaction.

Putting the sales process into context

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.



Processing sales

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)
- 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
- 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
- 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.

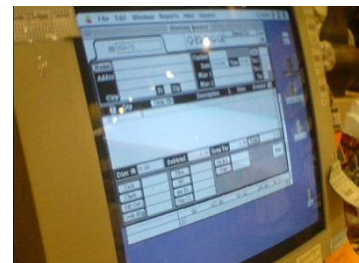
Operators must be able to:

- 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
- 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.



3.2 Accept payment for goods and services purchased

Introduction

When products and services have been registered there is a need for items to be paid for. This section looks at options for accepting payment and discusses payment-related skills.

Methods of payment

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
- 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



- 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.

Cash handling skills

Most workplaces will provide basic cash handling skills to all new employees to ensure they are aware of and able to follow the security and service protocols required by the business.

The following are generally accepted as standard cash handling procedures for staff involved in accepting payment and giving change:

- 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
- 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.



3.3 Establish rapport with customers during the service

Introduction

A non-negotiable requirement when conducting all POS transactions is the need to establish rapport with customers.

This section identifies why this is necessary and explains how it may be achieved.

Need to establish rapport

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 is 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.



It is vital:

- Money spent by customers is never taken for granted
- Customers are never taken for granted
- All purchases are acknowledged
- Comply with internal SOPs and policies – relating to:
 - Customer service
 - Public statements/promises made about service delivery.

Establishing rapport

A combination of these 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.



This means:

- Using it with respect and due deference – rather than using it to indicate over-familiarity
 - Pronouncing it correctly
 - Avoiding use of nick-names
 - Using honorific's where they apply
- 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.

These questions may relate to:

- The items being purchased
 - Services which they have just experienced/bought
 - Other products/services offered by the business
 - General terms and conditions of sale
 - Specials and items which may be 'on sale' or subject to up-coming sales
 - Facilities available through the business
- 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 as a sales technique intentionally designed to create additional sales
 - Inform customers of the savings and/or benefits they may gain from taking advantage of sales, specials or packaged deals
 - 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.

3.4 Optimise sales for each transaction, as appropriate

Introduction

Business owners and managers expect all frontline staff to optimise sales for the organisation as a standard part of their ongoing role and responsibility.

This section looks at the need for staff to create sales and presents options which have proved effective in doing so.

Being an Order Maker

Businesses expect their staff to be 'Order makers' and must 'Order takers'.

This highlights business want their staff to optimise sales for each transaction.

It is however important to understand:

- 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.



Need to create sales

It is important 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.



Optimising sales

Techniques for optimising sales may include:

- 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.

3.5 Process returns, refunds and exchanges

Introduction

All businesses will be involved in exchanges, refunds and returns because they are a normal part of the retail business.

This section discusses the legal position when handling these transactions and presents practical advice to assist with processing.

The legal position

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.

The role of customer service in these transactions

Exchanges, refunds and returns are an area of limitless potential problems.

Many customers who present themselves to obtain an exchange, refund or return are a bit annoyed to begin with and, often, expecting there to be a problem with what they consider to be a fairly straightforward transaction.

For this reason, it is very important to maintain the highest levels of customer service while at the same time ensuring compliance with internal policy.

When the customer has a complaint, the three important requirements are:

- Show genuine interest and concern by demonstrating an empathetic attitude
- Apologise for the problem/situation
- Demonstrate interest in solving their problem, rather than trying to cause them more problems.

Dealing with exchanges, refunds and returns

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 exercise this discretion but not exceed it.

Processing items

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 for same 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. (See *section 3.8 for more*)

- 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.

3.6 Create and maintain efficient service levels at point of sale area

Introduction

At all times when POS areas are in operation there is a need to create and maintain efficient service levels.

This section describes activities to enable this to happen.

Sustaining efficient service levels

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
- 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.



3.7 Conduct bag searches

Introduction

In some retail situations management may impose a need for customer bag searches to be conducted.

This section presents requirements in relation to this potentially very sensitive topic.

Personnel involved

Bag searches, also known as '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.

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.



The context for bag checks

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 information below provides important context in relation to bag checks:

- 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.

Bag checking – the practicalities

Training and preparation

It is very important to obtain in-house training in this aspect of theft minimisation before trying to put bag inspections into practice.

This means:

- 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.

The practicalities

Checking customer bags should feature the following:

- 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.



3.8 Complete point of sale documentation to accompany transactions

Introduction

Point-of-sale operators will need to complete a range of documentation from time-to-time to reflect the nature of certain transactions.

This section identifies circumstances and transactions where POS documentation may need to be completed.

Completing sales-related paperwork

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.

In other cases there can be a need to complete:

- 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



- 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 complete 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

- 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
- 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': see section 5.1 for more information.



Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

3.1 Operate a POS area delivering customer service providing (real-time or video/photographic) evidence you can:

- Process cash sales using a cash register/terminal
 - Accept payment via two non-cash forms completing supporting documentation
 - Establish and maintain positive customer relations
 - Optimise sales within ethical parameters
 - Process an item returned by a customer completing supporting documentation
 - Maintain the POS area in an efficient and effective state
 - Conduct a bag search.
-

Summary

Conduct point of sale transactions

When conducting point of sale transactions:

- Apply positive customer relations skills
- Never pressure people to buy
- Deliver service to meet customer wishes and exceed their expectations
- Be polite and courteous
- Work promptly but ensure accuracy
- Explain charges as required
- Respond to customer questions and queries
- Be proactive in handling problems and resolving disputes
- Thank customers for payments
- Only take payment in accepted methods
- Use service excellence to provide a point of difference
- Optimise sales wherever possible ensuring offers match/reflect identified need
- Maintain the condition of the service area
- Process returns, refunds and exchanges in accordance with legislation and organisational policies
- Undertake bag searches strictly in accordance with business SOPs
- Never force someone to submit to a bag search
- Complete POS documents as and when required to support sales and other transactions.

Element 4: Wrap and pack items

4.1 Select appropriate wrapping and packaging material for goods

Introduction

The first step in wrapping and packing items is to select the most appropriate materials to use.

This section gives a context for wrapping and packaging and identifies considerations which need to be taken into account.

This Element must be read in conjunction with section 2.2.

Context

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.



Wrapping and packaging considerations

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/package 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
- 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/package 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.



4.2 Wrap and pack items purchased by customers

Introduction

When wrapping and packaging materials have been selected the next step is to wrap/package items for customers.

This section looks at issues involved in this often over-looked aspect of customer service.

Wrapping and packing

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
- 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.



4.3 Make arrangements to forward or transfer goods in accordance with customer requirements

Introduction

For some customers there can be a need to make arrangements to forward or transfer the items they have purchased.

This section discusses possible requirements in this regard.

Need to forward/transfer goods

'Forwarding' or 'transferring' goods means sending them somewhere, as opposed to the customer taking the items with them.

Items may need to be forwarded or transferred 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.



Forwarding/transferring goods

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

- 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.



Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

4.1 Wrap and pack nominated items providing (real-time or video/photographic) evidence you can:

- Select appropriate materials for the job
 - Produce a visually acceptable end-product
 - Maintain positive customer relations while wrapping/packing the items
 - Take necessary customer details required for forwarding/transferring items.
-

Summary

Wrap and pack items

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
- Focus on an appealing final product
- Protect items from damage
- Produce a consistent outcome
- Maintain positive contact with customer during the process
- Gift wrap if required
- Thank the customer as part of the process
- Make arrangements for forwarding/transferring items if required
- Pass on extra charges as/if applicable.

Element 5:

Close the point of sale area

5.1 Close and reconcile the register/terminal

Introduction

A primary task when closing the point-of-sale area is the need to close and reconcile the register/terminal.

This section identifies and discusses the activities involved in this important activity.

Securing the area

When the business closes for the day the POS area needs to be secured to safeguard the takings.

Sometimes a screen may be drawn down around the point of sale area and any access such as doors locked. The takings are then prepared for reconciliation.

In other instances, cash drawers are removed from point of sale registers or terminals to a secure location and counted. A security staff member may accompany the cash drawer to a secure location.

All establishments will have their own security procedures to follow that usually relate to:

- Signing out or off from the point of sale register or terminal
- Timing of closure/reconciliation
- Staff members involved/authorised to perform reconciliation
- Where the takings are counted
- Documentation used to record the reconciliation.



Obtaining register/terminal reading

Once the point of sale area is secure and the cash drawer is ready to be counted, the process of reconciling takings can begin.

A necessary step in balancing takings is to identify what the takings should be.

Obtaining a reading from the terminal that is being reconciled does this.

How is the reading taken?

Every point of sale register or terminal offers the facility to calculate the total amount received from customers at that register or terminal at any given time.

Sometimes keys are required to access the required function and sometimes a password or other form of secure ID will need to be used.

Types of readings

There are two types of readings that a point of sale register or terminal will produce.

It will depend on the purpose of the reading and individual organisational procedures as to which reading is used.

Summary reading

A summary reading provides a reading or report on all the financial transactions processed through the POS register or terminal during the day or shift.

It may also be a *cumulative* total showing the balance of all financial transactions over a period of days or shifts. Totals are never cleared from the register or terminal.

Sometimes point of sale registers or terminals call this:

- An 'X' read
- A terminal subtotal
- A cumulative total.



1	24378	0.00	
2	26852	0.00	
3	23386	45.00	92.1
4	510515	0.00	0.0
5	506781	0.00	0.0
6	92001	0.00	0.0
7	95001	0.00	0.0
8	94011	0.00	0.0
9	514278	0.00	0.0
10	518003	99.00	99.0
11	534941	0.00	0.0
12	90010	20.00	20.0
13	90120	0.00	0.0

The purpose for the summary read is twofold. Total takings from sales for one day or shift are identified and documented. This forms part of the audit trail to track revenue. A cumulative total means staff cannot exactly identify the takings for any one day or shift so the temptation for theft or fraud is reduced.

For example, the takings for Day 1 may be an amount of 1,000. This would be left in the register or terminal memory and printed out on the audit roll at the end of trade.

At the end of Day 2 when the till is read, the total may be an amount of 2,000. In order to calculate the takings for Day 2 (1,000.00), you would need access to the reading from Day 1.

This reconciliation would be performed by accounts staff who will compare the final cash counted to the summary reading.

Final reading or report

This report provides a final amount of all the financial transactions that have been processed through the point of sale terminal or register during the shift or day.

The register or terminal's memory is cleared of these transactions, leaving the register ready for the next day or shift's transactions.

Sometimes POS registers or terminals call this:

- A 'Z' read
- A Terminal Total
- A Final balance.

The final report produced represents the actual financial sale transactions for that day or shift alone.

Imprinted on the report will also be an indication that the register or terminal has been reset to zero. Often this is shown as '0000.00' and will also be the first item imprinted when the register or terminal is opened the next day.

Counting cash in register/terminal

Counting cash must occur:

- In a secure location or a secure point of sale area
- Responsibly and with care
- In accordance with internal training
- Using designated documentation to record takings and the reconciliation process.

Using a Summary Sheet

A Summary Sheet (or Takings Sheet) is used to record the cash takings and non-cash takings from each register or terminal every time it is balanced.

It contains space for the following details:

- The amount of different denominations of notes and coins
- The type and amount of non-cash takings
- The register reading (final) or readings (summary)
- The difference between expected takings and actual cash amounts counted – called the variance/variation
- The date and the number or location of the register or terminal to which the figures relate.

The basic process

A set of standard steps are always followed in the reconciliation process as outlined below even where specifics vary between businesses:

- Count the takings starting with counting the coins – beginning with the lowest denomination
- Count the notes next – separating them by types denomination
- Once all notes have been counted and neatly secured, total amounts should then also be entered onto the Cash Summary Sheet
- Once all cash (notes and coins) has been counted, non-cash payments are addressed.



Calculating non-cash payments

As well as notes and coins in the cash drawer, there is also documentation detailing the non-cash payments made for financial sales transactions in the day or shift.

This must also be reconciled with the summary or final reading from the point of sale register or terminal and entered on the Cash Summary Sheet.

The types of non-cash transactions that may be need to be balanced are:

- Bank card transactions
- Personal cheques
- Accounts
- Vouchers
- Traveller's cheques and foreign currency when accepted.

Non-cash transactions of the same type are added together and the total entered into the appropriate space on the Cash Summary sheet.

Always double-check information on any documentation as it is being handled/reconciled.

For example:

- Check appropriate authorisations on all bank card transactions such as signatures and valid dates
- Review personal cheques
- Ensure documentation for payments on accounts is complete.

Disbursements and payments

Sometimes, during trading money may need to be taken out of the register to pay for a miscellaneous item.

In such instances, documentation such as a Cash Out or Cash Paid Out slip is placed into the point of register or terminal.

As part of the reconciliation process, all Cash Out slips must be totalled and the amount entered on the Cash Summary sheet.

Determining balance between register/terminal reading and cash and non-cash totals

Balancing the takings

Once all cash and non-cash payments have been calculated and the amounts entered on the Cash Summary Sheet, the next step is to compare these individual amounts with the figures as stated on the reading from the point of sale register or terminal.

The final reading will generally provide a comprehensive listing of the different cash and non-cash financial transactions processed and an overall total amount for all transactions for that shift or day's trading.

The aim is to determine whether or not the amount of cash and non-cash transactions actually counted matches that as stated on the final reading.

To balance the takings:

- Add the total of each group of cash and non-cash transactions on the Cash Summary Sheet to arrive at individual balances
- Add these individual balances to arrive at an overall grand total for the register or terminal for the trading period.



The overall total as well as individual balances should be compared with the appropriate figures on the summary or final reading on the register tape or roll.

If the figures match, the takings are balanced.

Often however, the actual cash and non-cash received does not match the figures stated on the register reading.

When this occurs, there is a 'variance'.

This means money is either 'over' the register amount or 'under' it. The variance is therefore also known as 'overs' and 'unders'.

Investigating and resolving discrepancies

Where a variance exists, house policies may require a number of things to be done identify if there:

- Has been a procedural error
- Is an actual variance.

There is always the chance operators have simply made a mistake when counting the money/reconciling the register so it is important to check.

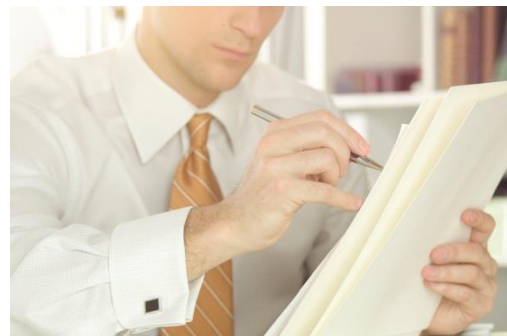
Checks commonly required to be made include:

- Recounting the coins and notes – to confirm their totals are correct
- Recounting the individual non-cash transactions – to verify their totals
- Recalculating figures as found on Summary/Takings Sheet – to ensure the problem is not an arithmetic one
- Checking for any over-rings – an over-ring happens when a staff member accidentally rings up an amount on a cash register, and no payment is received.

Usually most businesses require their staff to insert 'over-ring slips' into the cash register which explain:

- Why the over-ring happened
- When it occurred
- Who did it?

Over-rings must be taken into consideration when balancing the takings.



Acceptable error

Most businesses have a 'margin for error' and accept variances of predetermined proportions.

For example:

- Takings that are 2% or less, below printout figures may be seen as acceptable
- In other cases, it may be that takings that are within a certain money value of the readings are deemed to be acceptable.

5.2 Shut down point of sale equipment

Introduction

Standard closing procedures include the need to shut down designated items of POS equipment.

This section describes what may be required in this regard.



Closing down

Overview

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.

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.

Associated activities

The 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.



5.3 Requisition items required for next session

Introduction

There is an ongoing need to replenish supplies at the POS area.

This section looks at the use of requisition forms to achieve this.

Role of the requisition form

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.



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.

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.

Contents of the requisition form

The requisition form generally contains the following information:

- 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.

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.

5.4 Activate security systems, where appropriate

Introduction

In some business situations there can be a need to activate security systems as part of closing procedures.

This section underlines the important aspects of this vital task.

Securing the area

POS staff may 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
- 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.



5.5 Finalise internal documentation related to transactions and service

Introduction

There will always be a need to complete a selection of documentation as part of standard closing activities.

This section identifies the paperwork that may need to be completed as part of closing procedures.

Context

Completing documents may mean:

- 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’.



Documents to be completed

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
- 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.

5.6 Notify management of issues arising during service session

Introduction

All staff are expected to communicate with management about any matters with the potential to impact on service delivery and/or the viable operation of the business.

This section details requirements in this respect.

Staff de-briefings

Role

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.

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.



Issues addressed

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

- 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.



Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

5.1 Shut down a POS area after service providing (real-time or video/photographic) evidence you can:

- Close and reconcile the register/terminal
- Turn off equipment, facilities and systems
- Requisition items to replenish used items
- Activate security systems and secure the area
- Finalise nominated documents/records associated with sales/selling
- Participate in a de-briefing raising and discussing one relevant issue.

Summary

Close the point of sale area

When closing the point of sale area:

- Secure the immediate POS area
- Count takings and reconcile the register/terminal
- Investigate and resolve variances
- Shut down POS equipment, facilities and systems in accordance with internal protocols
- Combine shut down activities with other inspection and checking tasks
- Requisition items/stock for next session to replenish used/sold items
- Activate security devices and systems
- Check the premises to ensure customers are not left in the building
- 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.

Presentation of written work

1. Introduction

It is important for students to present carefully prepared written work. Written presentation in industry must be professional in appearance and accurate in content. If students develop good writing skills whilst studying, they are able to easily transfer those skills to the workplace.

2. Style



Students should write in a style that is simple and concise. Short sentences and paragraphs are easier to read and understand. It helps to write a plan and at least one draft of the written work so that the final product will be well organised. The points presented will then follow a logical sequence and be relevant. Students should frequently refer to the question asked, to keep 'on track'. Teachers recognise and are critical of work that does not answer the question, or is 'padded' with irrelevant material. In summary, remember to:

- Plan ahead
- Be clear and concise
- Answer the question
- Proofread the final draft.

3. Presenting Written Work

Types of written work

Students may be asked to write:

- Short and long reports
- Essays
- Records of interviews
- Questionnaires
- Business letters
- Resumes.



Format

All written work should be presented on A4 paper, single-sided with a left-hand margin. If work is word-processed, one-and-a-half or double spacing should be used. Handwritten work must be legible and should also be well spaced to allow for ease of reading. New paragraphs should not be indented but should be separated by a space. Pages must be numbered. If headings are also to be numbered, students should use a logical and sequential system of numbering.

Cover Sheet

All written work should be submitted with a cover sheet stapled to the front that contains:

- The student's name and student number
- The name of the class/unit
- The due date of the work
- The title of the work
- The teacher's name
- A signed declaration that the work does not involve plagiarism.

Keeping a Copy

Students must keep a copy of the written work in case it is lost. This rarely happens but it can be disastrous if a copy has not been kept.

Inclusive language

This means language that includes every section of the population. For instance, if a student were to write 'A nurse is responsible for the patients in her care at all times' it would be implying that all nurses are female and would be excluding male nurses.

Examples of appropriate language are shown on the right:

Mankind	<i>Humankind</i>
Barman/maid	<i>Bar attendant</i>
Host/hostess	<i>Host</i>
Waiter/waitress	<i>Waiter or waiting staff</i>

Recommended reading

Note: all Recommended Reading is sourced from 'Trove: National Library of Australia' at <http://trove.nla.gov.au/>.

2002. *WRRCS2B Apply point of sale handling procedures*, Version 1.00, Australian Training Products, Melbourne, Vic.

Aspire Learning Resources (issuing body.) 2013, *SIRXCCS201 : apply point-of-sale handling procedures*, SIR07 Version 3.1, (Aspire Version 1.1), Melbourne Aspire Learning Resources.

Billington, Elaine & Aspire Training & Consulting 2007, *SIRXCCS001A Apply point-of-sale handling procedures*, Version 1.1, Aspire Training & Consulting, Melbourne, Vic.

Hickman, Alan & Walters-Quan, Suzanne 2006, *WRRCS2B apply point of sale handling procedures*, Pearson Education Australia, Scope, Frenches Forest, NSW.

MWTC Pty Ltd 2000, *Vocational language, literacy & numeracy activities to support Certificate II in Retail WRR10102: core unit WRRCS2B, Apply point of sale handling procedures*, MWTC, Scarborough, Qld.

New South Wales. Dept. of Education and Training. Centre for Learning and Innovation and Australian Flexible Learning Framework *Retailer Toolbox 10.05* (Version 1.0 Hybrid CD).
New South Wales. Dept. of Education and Training. Centre for Learning Innovation, [Sydney, NSW], 2007.

SmallPrint Australia (Firm) 2012, *SIRXFIN201 Balance and secure point-of-sale terminal: learner guide*, [Revised], [Australia] smallPRINT.

SmallPrint Australia (Firm) 2009, *SIRXCCS001A, Apply point-of-sale handling procedures: learner guide*, Version VC1, smallPRINT, [Australia].

Tilley, Ruth & Aspire Training & Consulting 2007, *SIRXFIN001A Balance point-of-sale terminal*, Version 1.1, Aspire Training & Consulting, Melbourne, Vic.

Trainee evaluation sheet

Apply point of sale handling techniques

The following statements are about the competency you have just completed.

Please tick the appropriate box	Agree	Don't Know	Do Not Agree	Does Not Apply
There was too much in this competency to cover without rushing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Most of the competency seemed relevant to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The competency was at the right level for me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I got enough help from my trainer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The amount of activities was sufficient.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The competency allowed me to use my own initiative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My training was well-organised.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My trainer had time to answer my questions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understood how I was going to be assessed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was given enough time to practice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My trainer feedback was useful.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enough equipment was available and it worked well.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The activities were too hard for me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The best things about this unit were:

The worst things about this unit were:

The things you should change in this unit are:

Trainee self-assessment checklist

As an indicator to your Trainer/Assessor of your readiness for assessment in this unit please complete the following and hand to your Trainer/Assessor.

Apply point of sale handling techniques

		Yes	No*
Element 1: Prepare point of sale for service			
1.1	Identify point of sale equipment, facilities and systems	<input type="checkbox"/>	<input type="checkbox"/>
1.2	Prepare point of sale equipment, facilities and systems for use	<input type="checkbox"/>	<input type="checkbox"/>
1.3	Open the point of sale area for service	<input type="checkbox"/>	<input type="checkbox"/>
Element 2: Operate point of sale equipment			
2.1	Operate point of sale equipment, facilities and system according to manufacturer's instructions	<input type="checkbox"/>	<input type="checkbox"/>
2.2	Operate point of sale wrapping and packing equipment and use wrapping and packing materials according to manufacturer's instructions and house policies	<input type="checkbox"/>	<input type="checkbox"/>
Element 3: Conduct point of sale transactions			
3.1	Process sales in accordance with customer wishes	<input type="checkbox"/>	<input type="checkbox"/>
3.2	Accept payment for goods and services purchased	<input type="checkbox"/>	<input type="checkbox"/>
3.3	Establish rapport with customers during the service	<input type="checkbox"/>	<input type="checkbox"/>
3.4	Optimise sales for each transaction, as appropriate	<input type="checkbox"/>	<input type="checkbox"/>
3.5	Process returns, refunds and exchanges	<input type="checkbox"/>	<input type="checkbox"/>
3.6	Create and maintain efficient service levels at point of sale area	<input type="checkbox"/>	<input type="checkbox"/>
3.7	Conduct bag searches	<input type="checkbox"/>	<input type="checkbox"/>
3.8	Complete point of sale documentation to accompany transactions	<input type="checkbox"/>	<input type="checkbox"/>
Element 4: Wrap and pack items			
4.1	Select appropriate wrapping and packaging material for goods	<input type="checkbox"/>	<input type="checkbox"/>
4.2	Wrap and pack items purchased by customers	<input type="checkbox"/>	<input type="checkbox"/>
4.3	Make arrangements to forward or transfer goods in accordance with customer requirements	<input type="checkbox"/>	<input type="checkbox"/>

		Yes	No*
Element 5: Close the point of sale area			
5.1	Close and reconcile the register/terminal	<input type="checkbox"/>	<input type="checkbox"/>
5.2	Shut down point of sale equipment	<input type="checkbox"/>	<input type="checkbox"/>
5.3	Requisition items required for next session	<input type="checkbox"/>	<input type="checkbox"/>
5.4	Activate security systems, where appropriate	<input type="checkbox"/>	<input type="checkbox"/>
5.5	Finalise internal documentation related to transactions and service	<input type="checkbox"/>	<input type="checkbox"/>
5.6	Notify management of issues arising during service session	<input type="checkbox"/>	<input type="checkbox"/>

Statement by Trainee:

I believe I am ready to be assessed on the following as indicated above:

Signed: _____

Date: _____

Note:

For all boxes where a **No*** is ticked, please provide details of the extra steps or work you need to do to become ready for assessment.

