UBU17

Processing sales orders

The aim of this unit is to develop your knowledge, understanding and skills to process and follow up on sales orders. You will learn how to identify the customer's order requirements and to check they are aware of the terms and conditions of the sale. You will also learn how to follow up with the customer after the sales order has been processed and any problems that may have arised.

Level

2

Credit value

2

GLH

17

Observation(s)

2

External paper(s)

0



Processing sales orders

Learning outcomes

On completion of this unit you will:

1. Be able to process sales orders
2. Be able to follow up sales order processing
3. Understand how to process and follow up sales orders

Evidence requirements

1. *Environment*
   Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).
2. *Simulation*
   Simulation is not allowed in this unit.
3. *Observation outcomes*
   Competent performance of Observation outcomes must be demonstrated on **at least two occasions**. Assessor observations, witness testimonies and products of work are likely to be the most appropriate sources of performance evidence. Professional discussion may be used as supplementary evidence for those criteria that do not naturally occur.

   Assessed observations should not be carried out on the same day for the same learning outcome. There should be sufficient time between assessments for reflection and personal development.

   You need to meet the same standard on a regular and consistent basis. Separating the assessments by a period of at least two weeks is recommended as competence must be demonstrated on a consistent and regular basis.
4. *Knowledge outcomes*
   There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.
5. *Tutor/Assessor guidance*
   You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

   For guidance on the assessment material for some individual units please refer to the '**Qualification Specification**'. This can be found on www.vtctskills.org.uk.
6. *External paper*
   There is no external paper requirement for this unit.

Achieving observations

Achieving observation outcomes

Your assessor will observe your performance of practical tasks. The minimum number of competent observations required is indicated in the Evidence requirements section of this unit.

Criteria may not always naturally occur during a practical observation. In such instances you will be asked questions to demonstrate your competence in this area. Your assessor will document the criteria that have been achieved through professional discussion and/or oral questioning. This evidence will be recorded by your assessor in written form or by other appropriate means.

Your assessor will sign off a learning outcome when all criteria have been competently achieved.

Relationship to National Occupational Standards

Council for Administration Sales National Occupational Standards:

- SLS83 Process customer orders and payments



Observations

Learning outcome 1

Be able to process sales orders

You can:

a. Identify customer sales order requirements*

b. Check that the credit status of the customer meets organisational standards*

c. Confirm the availability of products and/or services to the customer*

d. Ensure that information given to the customer about delivery, timing and price is accurate*

e. Ensure that the sale is authorised following the organisation's procedures*

f. Finalise the transaction in accordance with organisational procedures*

g. Ensure that the customer is aware of the terms and conditions of sale*

h. Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders*

i. Identify who to go to when in need of support with sales order processing problems*

**May be assessed by supplementary evidence.*

Observation	1	2	*Optional*
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			



Learning outcome 2

Be able to follow up sales order processing

You can:

a. Keep the customer informed of the sales order progress and any problems with the sale order*

b. Advise the customer of current discounts and special offers*

c. Check all information is stored securely*

**May be assessed by supplementary evidence.*

Observation	1	2	*Optional*
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

**This is not an exhaustive list.*

Knowledge



Learning outcome 3

Understand how to process and follow up sales orders

You can:	Portfolio reference
a. Explain the importance of sales order processing	
b. Describe organisational processes for ordering products and/or services	
c. Describe different sources of information used to check customer credit	
d. Describe the different payment methods accepted by sales orientated organisations	
e. Explain the role of the despatch function	
f. Describe service standards relating to sales order completion	
g. Explain the importance of storing information securely	