SITXCCS018 Make bookings and process documentation

Release: 1

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Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to make and administer customer bookings for products and services. It requires the ability to administer all bookings from identification of customer booking requirements, through to finalisation and issue of documentation. This may include determining availability of the product or service, offering alternatives, accurately recording the booking details, interpreting all documentation requirements, and preparing and despatching documents within designated deadlines.

The unit applies to frontline sales and operations personnel in any type of business that takes bookings and issues documentation relating to products or services, who operate with some level of independence and under limited supervision.

The skills in this unit of competency must be applied in accordance with Commonwealth and State/Territory legislation, Australian standards and industry codes of practice.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Client and Customer Service

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Confirm booking request.	1.1. Confirm client requirements for products or services and record any special requests or special needs.
	1.2. Determine availability of requested product or service and advise customer, offering alternatives for unavailable

products or services.

1.3. Provide all details to customer, and then confirm their understanding and agreement, responding to any customer questions.

1.4. Provide details of amendment or cancellation conditions and charges and confirm customer understanding and agreement.

2. Administer customer file and identify booking requirements.

2.1. Record customer details against booking and use available customer profile or history if available.

2.2. Identify details of all supplier products and services required by customer.

2.3. Select suppliers to meet customer requirements and maximise the profitability of the sale.

3. Request products and services.

3.1. Request products and services from suppliers according to organisational policies and procedures.

3.2. Provide full details of required booking to ensure customer receives correct product or service.

3.3. Request return confirmation of booking from supplier.

3.4. File records of all bookings, including requests and confirmations, according to system and procedural requirements.

4. Update and finalise bookings.

4.1. Monitor files to ensure all confirmations are received and follow up outstanding confirmations.

4.2. Note and schedule future action to be taken for bookings.

4.3. Make and record necessary amendments or adjustments to bookings.

5. Process documentation.

5.1. Interpret existing booking data to identify all customer details.

5.2. Identify and interpret details of specific products and services confirmed to customer and check prices quoted.

5.3. Check payment status of customer files and take required action.

5.4. Check for and report any discrepancies in costs.

5.5. Action supplier payments as required, within designated deadlines.

6. Finalise and issue documentation.

6.1. Check all documentation for accuracy prior to issue and amend as necessary.

6.2. Prepare and issue documentation within designated timeframes.

6.3. File copies of documents according to organisational procedures.

6.4. Process required refunds or additional payments according

to product or service conditions.

6.5. Minimise use of printed materials and maximise electronic transmission and record keeping to reduce waste.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret customer files, requests and quotations, complex product and costing information, supplier confirmations and any applicable conditions.
Writing skills to:	• complete customer documents accurately and legibly • record clear and succinct bookings and file notes.
Oral communication skills to:	• elicit information from customers about their requirements • respond to customers, giving clear sequenced information on product information and reservation options • discuss customer data and cost discrepancies with colleagues or supervisors.
Numeracy skills to:	• interpret costs confirmed by the supplier • create and maintain financial documentation to administer bookings.
Planning and organising skills to:	• prepare and issue documents in correct customer file sequence.
Technology skills to:	• manipulate features of computerised booking systems.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694