



Australian Government

SITXCCS019 Prepare quotations

Release: 1

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Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to calculate the costs of products and services and to present quotations to customers. It requires the ability to provide quotations for products and services where business pricing has already been determined.

The unit applies to any type of organisation and quotations can be for any product or service. It applies to frontline sales or operations personnel 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
<i>Elements describe the essential outcomes</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Calculate costs of products and services.	1.1. Create customer file to administer customer details and requirements. 1.2. Source, select and interpret product or service costing information to prepare quotation. 1.3. Calculate commissions or mark-up net costs according to organisational procedures to determine a profitable selling

- price.
- 1.4. Calculate any additional taxes, fees or other charges.
 - 1.5. Check product or service package cost calculation against all individual product and service components.
 - 1.6. Determine final cost of product or service package and record on customer file according to organisational procedures.
2. Provide quotations to customer.
 - 2.1. Prepare quotation to reflect customer requirements and provide to customer according to organisational procedures and formats.
 - 2.2. Include accurate details of cost of product and service provision, and conditions and limitations of quotation.
 - 2.3. Minimise use of printed materials and maximise electronic transmission and record keeping to reduce waste.
 3. Update and record quotations.
 - 3.1. Adjust and update quotations to take account of changed customer requests or arrangements.
 - 3.2. Provide most up-to-date quotation to customer inclusive of current conditions and limitations.
 - 3.3. Record all details of adjusted quotations on customer file.

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 documents, customer files, customer requests and product or service costing information.
Writing skills to:	record customer details and requests and quotations in a clear format and style, with accurate details of conditions and limitations specifically applicable to the quotation.
Numeracy skills to:	- interpret product or service costing information and calculate costs for all products or services - interpret and calculate any sales and product coordination fees.
Problem-solving skills to:	identify and resolve mistakes in calculations.
Planning and organising skills to:	prepare quotations in correct customer file sequence according to the earliest service dates for customers.
Technology skills to:	use computer systems and software to prepare quotations.

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>