



Australian Government

Department of Education, Employment and Workplace Relations

SIRXINV002A Maintain and order stock

Revision Number: 2

SIRXINV002A Maintain and order stock

Modification History

The version details of this endorsed unit are in the table below. The latest information is at the top.

Release	Comments
Second Release	Editorial updates

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to maintain and order stock in a retail environment. It involves monitoring receipt and dispatch of goods, maintaining stock records, coordinating stocktake, identifying stock losses, processing orders and following up on orders.

Application of the Unit

This unit applies to retail staff who are responsible for monitoring and coordinating stock levels, storage, distribution and reorder cycles. It includes rostering staff, organising and coordinating stocktakes, maintaining accurate records and routinely reporting on inventory status to relevant personnel according to store policy and procedures.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Nil

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements and Performance Criteria

Element

Performance criteria

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

1. Monitor receipt and dispatch of goods.

- 1.1. Delegate responsibility for receipt and dispatch of goods to ***appropriate staff***.
- 1.2. Implement store procedures in regard to receipt, dispatch and secure storage of goods.
- 1.3. Observe ***staff*** functions to ensure store procedures are followed and documentation is completed correctly.
- 1.4. Implement store procedures to ensure goods inspected for quantity and quality on receipt.
- 1.5. Act upon variations to quantity and quality of delivered goods, according to ***store policy and procedures***.
- 1.6. Supervise safe ***handling and storage of goods***, according to store policy.

2. Maintain stock records.

- 2.1. Monitor and maintain stock levels at required levels.
- 2.2. Maintain, monitor and adjust stock reorder cycles as required.
- 2.3. Inform team members of their individual responsibilities in regard to recording of stock.
- 2.4. Maintain stock storage and movement ***records***, according to store policy.
- 2.5. Record stock discrepancies and follow procedures according to store policy.
- 2.6. Monitor stock performance and identify and ***report*** fast and slow selling items according to store policy.

3. Coordinate stocktake or cyclical count.

- 3.1. Interpret policy and procedures in regard to ***stocktaking*** and cyclical counts and explain to team members.
- 3.2. ***Roster*** staff, according to allocated budget and time constraints.
- 3.3. Allocate stocktaking tasks to individual team members.
- 3.4. Provide team members with clear directions for the performance of each task.
- 3.5. Allocate team members to ensure effective use of staff resources to complete task.
- 3.6. Produce accurate reports on stocktake data, including discrepancies, for management.

4. Identify stock losses.
 - 4.1. Identify, record and assess losses against potential loss forecast on a regular basis.
 - 4.2. Identify avoidable losses and establish reasons.
 - 4.3. Recommend and implement possible solutions.
5. Process orders.
 - 5.1. Process and raise orders for stock as requested, according to store policy and procedures.
 - 5.2. Maintain **ordering and recording system**.
 - 5.3. Ensure availability of sample range, according to buying plan.
 - 5.4. Order pricing materials as required.
 - 5.5. Record negotiated purchase and supply agreements and file for retrieval.
6. Follow up orders.
 - 6.1. Monitor delivery process to meet agreed deadlines.
 - 6.2. Handle routine supply problems or refer to management as required by store policy.
 - 6.3. Maintain ongoing liaison with buyers, store or departments, warehouse and **suppliers** to ensure continuity of supply.
 - 6.4. Distribute stock, according to store or department allocation.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills

- technical skills to:
 - use store stocktaking systems
 - use electronic recording equipment
- interpersonal skills to:
 - inform team members of their responsibilities and give instructions
 - explain policies and procedures to staff
 - allocate tasks and provide directions for performance of tasks
 - liaise with buyers, store and departments, warehouse and suppliers through clear and direct communication
 - ask questions to identify and confirm requirements
 - use language and concepts appropriate to cultural differences
 - use and interpret non-verbal communication
- management skills to coordinate stock takes
- negotiation skills to handle supply problems
- literacy and numeracy skills to:
 - prepare and present stock control reports and documentation
 - process orders
 - maintain delivery and supply records
 - maintain stock distribution records
 - maintain stock ordering and recording systems

Required knowledge

- store policy and procedures in regard to:
 - stock control
 - store merchandising system
 - current and future stock levels
 - bar codes, labels and price tags
 - store stock recording system
 - stock replenishment and reorder procedures
 - inter- and intra-store and department transfers
 - reporting of stock discrepancies and damage
 - identifying and recording stock losses
 - identifying and recording discrepancies
 - existing suppliers
 - quality control procedures and requirements
 - receipt and dispatch of goods, including inspection for quality and quantity

- relevant licensing requirements for moving stock mechanically
- relevant legislation and statutory requirements
- relevant industry codes of practice
- relevant Work Health and Safety (WHS) legislation and codes of practice

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- consistently implements and monitors store policy and procedures regarding receipt, dispatch and secure storage of goods
- regularly monitors staff implementation of store procedures and documentation in regard to receipt, dispatch and secure storage of goods
- monitors stock levels, storage, movement and reorder cycles on a regular basis.
- organises and coordinates stocktake according to store policy and procedures
- consistently raises and processes stock orders and maintains record system according to store policy and procedures
- monitors delivery processes and distributes stock to ensure continuity of supply.

Context of and specific resources for assessment

Assessment must ensure access to:

- a retail work environment
- relevant documentation, such as:
 - store policy and procedures for receipt and dispatch of goods
 - store procedures for stocktake
 - WHS legislation and codes of practice
 - industry codes of practice
 - legislation and statutory requirements
 - store merchandising and marketing policy and procedures
 - inter- and intra-store and department transfer procedures
 - store quality control procedures and requirements.

Methods of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- observation of performance in the workplace
- third-party reports from a supervisor
- written or verbal questioning to assess knowledge and understanding

- review of portfolios of evidence and third-party workplace reports of on-the-job performance.

Guidance information for assessment

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the performance criteria is detailed below.

- Appropriate staff*** may include:
- frontline staff
 - relevant managers
 - supervisor
 - team leader
 - specialist staff.
- Staff*** may include:
- full-time, part-time, casual or contract staff
 - people from a range of social, cultural and ethnic backgrounds
 - people with varying degrees of language and literacy levels.
- Store policy and procedures*** in regard to:
- stock control
 - stock control system
 - recording procedures
 - procedures for investigating discrepancies
 - store merchandise and marketing
 - pricing, labelling and packaging requirements
 - quality control policy and procedures.
- Handling and storage of goods*** may vary according to:
- stock characteristics
 - industry codes of practice.
- Records*** may be:
- manual
 - digital.
- Reports*** for management may include:
- financial reports
 - business documents
 - informal reports
 - stocktake reports.
- Stocktaking*** may be:
- cyclical
 - compliance driven.
- Roster*** may include:
- varying levels of staff training
 - staffing levels
 - routine or busy trading conditions
 - full-time, part-time or casual staff
 - range of staff responsibilities.
- Ordering and recording system*** may be:
- manual
 - digital.
- Suppliers*** may include:
- existing contacts
 - new contacts

- local suppliers
- overseas supplies.

Unit Sector(s)

Cross-Sector

Competency field

Inventory