



Australian Government

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

Elements describe the essential outcomes

1. Confirm booking request.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 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>

Assessment Requirements for SITXCCS018 Make bookings and process documentation

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- process five bookings for different products or services from initial request to finalisation of the bookings, including at least one for:
 - a single product or service
 - a combination of at least three products or services
- service requests and provide confirmations efficiently for each of the above bookings
- maintain accurate records of above bookings and confirmations, including:
 - customer names and contact details
 - details of particular product or service requirements being booked
 - payment arrangements
 - loyalty program details
 - special needs and customer requests
- update financial status of above bookings, including:
 - checking correct method of payment
 - inputting method of payment
 - receiving, processing and recording payments
- issue the required paper-based or electronically transmitted customer documents for each of the above bookings
- complete above activities within commercial time constraints and deadlines determined by the customer, the supplier and the organisation.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- methods customers use to make bookings:
 - email
 - face-to-face
 - online
 - telephone
- features of booking systems used to administer the booking of products and services, including:

- booking systems and procedures
- products and services sold
- sources of product, service and logistical information
- sources of negotiated cost of supply, contractual arrangements and preferred supplier arrangements
- key details required for booking products and services and processing documentation and sources of this information:
 - customer details
 - name
 - address
 - age
 - special requirements
 - nature of product or service to be provided
 - in the case of a service, date, time and location of its commencement and conclusion
- types of products and services offered by the organisation
- booking and documentation requirements for different products and services and customer types
- industry terminology and common abbreviations used when making bookings
- primary components of consumer protection laws that relate to the provision of products and services, specifically organisational responsibility to:
 - supply products and services as described
 - substitute suitable products and services when unavailable
- processes involved in updating the financial status of bookings:
 - checking that the customer has fully paid
 - generating and issuing invoices and credit notes
 - receiving, processing and recording payments
 - making supplier payments
- formats and inclusions used in supplier booking requests, and styles that cater for those with special needs
- documentation types and standard formats:
 - confirmation documents
 - terms, conditions and liability restrictions
 - product disclosure statements
 - tickets or vouchers for products or services.

Assessment Conditions

Skills must be demonstrated in a safe environment, incorporating the use of industry-realistic simulations and scenarios.

Assessment must ensure access to:

- internet

- booking systems currently used by travel industry operators to book supplier services
- operational documentation, details of supplier contracts and customer files
- customers with whom the individual can interact; these can be:
 - customers in an industry workplace who are assisted by the individual during the assessment process; or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors and have worked in industry for at least three years where they have applied the skills and knowledge of this unit of competency.

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