

<b>UNIT TITLE:</b> RECEIVE AND STORE STOCK		<b>NOMINAL HOURS:</b> 15
<b>UNIT NUMBER:</b> D2.TGA.CL6.11		
<b>UNIT DESCRIPTOR:</b> This unit deals with skills and knowledge required to accept delivery of and store products in an establishment		
<b>ELEMENTS AND PERFORMANCE CRITERIA</b>	<b>UNIT VARIABLE AND ASSESSMENT GUIDE</b>	
<p><b>Element 1: Accept delivery of stock</b></p> <p>1.1 Check <i>internal systems</i> to identify incoming stock</p> <p>1.2 <i>Prepare the area</i> to receive stock</p> <p>1.3 <i>Verify delivery</i> is for the premises</p> <p>1.4 Check <i>incoming stock against relevant documentation</i></p> <p>1.5 Check <i>stock received against stock ordered</i></p> <p>1.6 <i>Identify variations</i> between delivery and documentation</p> <p>1.7 <i>Return stock</i> identified for return to supplier</p> <p>1.8 <i>Follow-up on variations</i> between delivery and relevant documentation</p> <p>1.9 <i>Manage excess stock</i> within the organization</p> <p>1.10 Secure new stock against damage and/or theft</p> <p><b>Element 2: Store stock</b></p> <p>2.1 <i>Move stock</i> to the required <i>operational area</i></p> <p>2.2 Apply appropriate <i>occupational health and safety skills</i></p>	<p><b>Unit Variables</b></p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.</p> <p>This unit applies to all industry sectors that order, receive and store stock for use in the operations of the enterprise within the labor divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> <li>1. Front Office</li> <li>2. Housekeeping</li> <li>3. Food and Beverage Service</li> <li>4. Food Production</li> <li>5. Travel Agencies</li> <li>6. Tour Operation</li> </ol> <p><i>Internal systems</i> may include:</p> <ul style="list-style-type: none"> <li>• purchase orders</li> <li>• verbal orders that have been placed</li> <li>• standing orders</li> <li>• telephone orders</li> <li>• online orders</li> </ul>	

<p>2.3 <i>Unpack stock items</i>, as required</p> <p>2.4 Load stock into <i>storage units</i></p> <p>2.5 <i>Remove waste</i> from the storage areas</p> <p>2.6 <i>Label stock</i> to identify items</p> <p><b>Element 3: Maintain stock and storage areas</b></p> <p>3.1 <i>Rotate stock</i> aligning with enterprise and stock item requirements</p> <p>3.2 <i>Inspect stock</i> and storage areas</p> <p>3.3 <i>Take remedial action</i> where stock related issues are identified</p> <p>3.4 Clean and tidy storage areas</p> <p>3.5 <i>Identify stock usage rates</i></p> <p><b>Element 4: Finalize documentation and stock management system requirements</b></p> <p>4.1 <i>Check and verify stock related documentation</i></p> <p>4.2 <i>Enter data into stock systems</i> to update stock levels</p> <p>4.3 <i>Authorize supplier documentation</i> for processing and payment</p>	<ul style="list-style-type: none"> <li>• facsimile orders</li> <li>• manual or computerized stock control/management systems.</li> </ul> <p><i>Prepare the area</i> will include:</p> <ul style="list-style-type: none"> <li>• cleaning the area</li> <li>• tidying the area including making a clear passage</li> <li>• removing other stock from the area</li> <li>• ensuring requirements for accepting deliveries are present, including weighing scales, thermometers, purchase orders, purchase specifications</li> <li>• ensuring security and safety requirements are in place.</li> </ul> <p><i>Stock</i> may include:</p> <ul style="list-style-type: none"> <li>• food and beverage items</li> <li>• equipment</li> <li>• cleaning materials and chemicals</li> <li>• stationery and office supplies</li> <li>• vouchers and tickets</li> <li>• souvenir products and merchandise.</li> </ul> <p><i>Verify delivery</i> may be related to:</p> <ul style="list-style-type: none"> <li>• checking that the stock being delivered has been ordered</li> <li>• checking that the delivery is being made to the correct business.</li> </ul> <p><i>Check incoming stock against relevant documentation</i> should include:</p> <ul style="list-style-type: none"> <li>• ensuring all items ordered have been supplied</li> <li>• checking all items listed have been delivered</li> <li>• ensuring all items are delivered in good condition</li> <li>• ensuring items are of the correct/ordered size</li> </ul>
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	<ul style="list-style-type: none"> <li>• ensuring items are of the correct quality</li> <li>• ensuring the correct price has been charged</li> <li>• applying specific food safety checks to food and beverage items, including checking temperatures, where appropriate, checking for pests, checking use-by dates, checking integrity of packaging, checking wholesomeness of the food</li> <li>• rejecting unsatisfactory goods.</li> </ul> <p><i>Check stock received against stock ordered</i> must include:</p> <ul style="list-style-type: none"> <li>• ensuring all stock ordered has been received</li> <li>• ensuring only stock ordered has been received</li> <li>• ensuring all aspects of the delivery match the order placed – including type, brand, quality, quantity, cost and alignment with purchases specifications, where appropriate.</li> </ul> <p><i>Identify variations</i> may include:</p> <ul style="list-style-type: none"> <li>• describing the nature of the variation, including under/over supplies, incorrect sizes and quality, etc</li> <li>• recording the variation on accompanying documentation and internal system</li> <li>• making verbal mention to the delivery driver, where applicable.</li> </ul> <p><i>Documentation</i> may include:</p> <ul style="list-style-type: none"> <li>• delivery dockets</li> <li>• invoices</li> <li>• purchase order guides</li> <li>• buying catalogues</li> <li>• purchase specifications.</li> </ul> <p><i>Return stock</i> may relate to:</p> <ul style="list-style-type: none"> <li>• ullages (evaporation/leakages) and damaged stock</li> <li>• out of date stock</li> </ul>
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- recalls
  - excess stock
  - unsatisfactory goods
  - poor quality goods.
- Follow-up on variations* may include:
- requesting credit notes from suppliers, where applicable
  - ordering supplementary stock from a different supplier
  - ordering substitute stock from the same or an alternative supplier
  - notifying the accounts department
  - recording action taken and arrangements with suppliers on documentation, or other appropriate systems/forms
  - informing internal personnel/departments regarding delivery problems, including the non-delivery of items, late deliveries, short deliveries, delivery of alternative items.
- Manage excess stock* may include:
- monitoring stock levels to ensure identified stock levels are not exceeded
  - reducing stock levels in one area to compensate for increases in another area
  - returning excess stock to supplier
  - attempting to exchange excess stock with another organization
  - suggesting uses for excess stock that will increase sales levels and/or usage rates
  - monitoring the use-by dates of stock.
- Move stock* may include:
- using trolleys to move stock
  - carrying items by hand

- re-loading stock onto another vehicle
  - ensuring safety and integrity of stock being moved
  - re-locating stock in a timely manner, including prioritizing foodstuffs to guard against food safety issues
  - comply with internal requirements, as advised.
- Operational area* may include:
- storage areas appropriate for the individual stock items, including dry goods store, refrigerated storage and frozen storage for food and beverage items, linen stores, chemical storage areas
  - working departments and locations where the stock items will be processed or offered for sale
  - on-site or off-premises situation.
- Occupational health and safety skills* must relate to manual handling skills and may include:
- ensuring there is no overloading of individuals, trolleys, etc
  - determining the characteristics of the package/item before attempting a carry or lift
  - ensuring route to be traveled is free of obstructions or risks
  - using designated internal transportation equipment and systems to move stock
  - ensuring compliance with manual handling requirements of the host country and the host enterprise, including correct lifting techniques, not stretching or straining, observing appropriate weight/load sizes, avoiding potentially injurious repetition
  - wearing protective clothing as appropriate which may include thermal clothing, gloves, protective boots.
- Unpack stock items* may include:
- removing individual items from cartons and packaging
  - checking quality and suitability of individual items as they are unpacked
  - determining items that should be left in cartons and packaging
  - maintaining the integrity of foods and beverages that are being processed.

*Storage units* may include:

- shelves
- bins
- specially provided storage containers
- refrigeration and freezer units.

*Remove waste* may include:

- taking packaging out of storage areas
- identifying and removing damaged or un-saleable items from the storage areas
- applying environmentally friendly practices to waste materials where appropriate, including the re-use of materials within the organization and recycling of suitable materials.

*Label stock* may include:

- placing labels on storage containers and shelving to identify stock items and indicate delivery date
- preparing hand written labels and attaching them to individual stock items
- using electronic bar coding and labeling equipment
- observing food safety requirements in relation to the labeling of food.

*Rotate stock* may include:

- applying stock rotation protocols relevant to individual stock type including:
  - First In, First Out
  - First In, Last Out
  - Last In, First Out
  - Last In, Last Out.

*Inspect stock* may include:

- undertaking visual inspections of storage area
- identifying stock approaching use-by date and out of date stock

- adhering to internal inspection schedules and checklists
  - checking stock quality
  - looking for signs of pest infestation, physical damage to the storage area itself, damage or degradation to stock items
  - ensuring stock is aligned with designated storage areas, bins etc.
- Take remedial action* may include:
- notifying relevant personnel
  - arranging for maintenance, including in-house and external
  - re-locating stock
  - protecting stock
  - disposing of damaged stock, including disposal to waste, or returning items to suppliers
  - arranging for nominated stock items to be used immediately
  - arranging for stock to be returned to suppliers
  - acting to address identified problems and threats as the need demands, including pest control, repairs to store rooms, removal of threats and damaged stock, cleaning, re-positioning stock to designated areas.
- Identify stock usage rates* may include:
- identifying fast and slow-moving stock items
  - advising relevant personnel in relation to stock usage and the need to order additional stock.
- Check and verify stock related documentation* may relate to paper-based or electronic versions of:
- purchase orders
  - delivery dockets and invoices
  - statements
  - credit notes
  - requisitions

- internal transfers
- bin cards

and include actions such as:

- checking cost prices for individual stock items
- checking extensions and calculations
- checking additional charges and fees, including taxes, delivery fees, re-pack charges, insurance
- checking legitimate entitlements have been allowed for including discounts, rebates, free items, bonus products, gifts, samples.

*Enter data into stock systems* may include:

- updating all stock related details
- recording deliveries into system
- removing damaged or returned stock from the system
- updating prices and other details relating to individual stock items and suppliers.

*Authorize supplier documentation* may include:

- noting issues arising on the documentation
- recording associated action taken in relation to the identified issue
- signing, initialing and/or dating documents.

#### **Assessment Guide**

The following skills and knowledge must be assessed as part of this unit:

- the enterprise's policies and procedures in regard to stock control and management including specifics relating to stock ordering, documentation processes, internal storage requirements
- principles of stock control and rotation
- ability to use safe food and beverage storage practices in accordance with host country legislated requirements

- understanding of the roles of stock related documentation
- ability to use required functions of internal computerized stock control systems, where applicable
- knowledge of the recommended and legislated storage requirements for stock items being processed
- knowledge of stock security systems and procedures
- knowledge of and ability to apply safe manual handling procedures, including the use of lifting and transporting equipment.

**Linkages To Other Units**

- Receive and store kitchen supplies and food stock
- Apply standard safety procedures for handling foodstuffs
- Access and retrieve computer-based data
- Apply standard safety procedures for handling foodstuffs
- Implement occupational health and safety procedures
- Comply with workplace hygiene procedures
- Develop and maintain food & beverage product knowledge
- Maintain a paper-based filing and retrieval system
- Use common business tools and technology
- Work cooperatively in a general administration environment
- Manage stock purchases and inventory
- Follow safety and security procedures
- Clean premises and equipment
- Clean and maintain industrial work area and equipment
- Clean and tidy bar and food service areas.

### **Critical Aspects of Assessment**

Evidence of the following is essential:

- understanding of host enterprise policies and procedures in regard to stock control and management including specifics relating to stock ordering, documentation processes, internal storage requirements
- demonstrated ability to receive, inspect, check and record a nominated delivery of food, beverage or other stock items
- demonstrated ability to effectively follow-up a nominated range of delivery related problems regarding document errors, such as incorrect pricing and stock errors, such as damaged stock, stock not matching delivery documentation
- demonstrated ability to place a nominated range of food, beverage or other stock items into appropriate storage ensuring compliance with required safe food handling, manual handling, stock rotation and stock recording practices
- demonstrated ability to update a nominated stock control system, paper-based or electronic, to reflect the receipt of a nominated delivery and the removal of damaged items from inventory.

### **Context of Assessment**

This unit may be assessed on or off the job

- Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility

### **Resource Implications**

Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

### **Assessment Methods**

The following methods may be used to assess competency for this unit:

- observation of practical candidate performance
- analysis of documentation used in the receiving of stock and the storage process

- inspection of stock and storage areas
- role plays
- oral and written questions
- third party reports completed by a supervisor
- project and assignment work.

**Key Competencies in this Unit**

*Level 1 = competence to undertake tasks effectively*

*Level 2 = competence to manage tasks*

*Level 3 = competence to use concepts for evaluating*

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, organizing and analyzing information	1	Obtaining information relating to inwards good delivery
Communicating ideas and information	1	Advising personnel in relation to stock that has not been delivered as ordered
Planning and organizing activities	2	Applying stock rotation procedures to stock
Working with others and in teams	2	Co-operating with delivery drivers
Using mathematical ideas and techniques	1	Calculating cost prices and verifying extensions
Solving problems	2	Addressing issues where stock received does not align with the order placed
Using technology	1	Using mechanical equipment to assist with transportation and lifting of stock Using a computerized stock control system