
Overview

This standard covers obtaining information from customers about their requirements, identifying the source and availability of the products and/or services and dealing with the processing of their order. Within this you will need to give accurate information to your customer and make arrangements to supply products and/or services. One focus of the standard is on collecting appropriate information, completing order forms, raising invoices and notifying the customer whether or not processing can be fulfilled in the normal timescales. This standard is for sales professionals who process customer orders and payments.

**Performance
criteria**

- You must be able to:
- P1 identify customer requirements accurately in relation to the order
 - P2 check that products and/or services are available and inform the customer
 - P3 ensure that the information on the status of the order given to the customer is both prompt and accurate in terms of delivery, timing and price
 - P4 make arrangements to reserve or secure the products and/or services to ensure they are available as promised
 - P5 check the credit status of the customer and ensure that the sale is authorised following organisational procedures
 - P6 complete organisational accounting procedures to finalise the transaction and ensure that the customer is fully aware of the terms and conditions of sale
 - P7 ensure that the customer's requirements are communicated promptly and accurately to those responsible for fulfilling orders
 - P8 ensure that the reasons for any delay in fulfilling the order are accurately noted and reported promptly to a person in authority
 - P9 keep the customer informed of the order progress at appropriate intervals
 - P10 notify the customer, politely and with a clear justification about any delays
 - P11 ensure all information is stored securely and is available only to those who are authorised to have it

Knowledge and understanding

You need to know and understand:

- K1 legislation and regulations relating to confidential information and processing of payments
- K2 organisational procedures relevant to processing customer orders and payments
- K3 the sources of information you need to complete the processing of orders
- K4 rights and responsibilities relating to consumer protection legislation
- K5 the variety of processes for ordering products and/or services
- K6 the different sources of information required for checking customer credit
- K7 the different payment methods accepted by the organisation
- K8 the use of databases in order processing
- K9 the concept of order fulfilling
- K10 the role of the despatch function within the organisation
- K11 how to store information securely in databases

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Suite	Sales (2013)
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