

Assessment Evidence Guide
for
“Prepare Inventory
Requirements and Reports”
Level-3



National Vocational & Technical
Training Commission

Instruction Sheet for the Candidate			
Title of Qualification: Certificate in Retail Operations Management (Sales Officer-Retail)	CS Code:	Level: 3	Version: 1
Competency Standard Title: Prepare inventory requirements and reports	Assessment Date (DD/MM/YY):		

Candidate Details	Name: Registration/Roll Number:.....
Guidance for Candidate	To meet this standard, you are required to complete the following tasks within the given time frame (for practical demonstration & assessment): Assessment Task 1: Candidate is required to prepare purchase requisition as per given data in Annexure A as per instruction given by assessor. Assessment Task 2: Candidate is required to perform following as per instruction given by assessor. ✓ Record inventory data ✓ Monitor shrinkage ✓ Perform stock taking And complete: Knowledge assessment test (Written or Oral) Portfolios at the time of assessment (if any)
Minimum Evidence Required	During a practical assessment, under observation by an assessor, you will complete: Assessment Task 1: Performance Criteria 1: Identify product requirements for store Performance Criteria 2: Make purchase requisition as per store policies Performance Criteria 3: Submit purchase requisition as per store policies Performance Criteria 4: Follow up on purchase requisition Performance Criteria 5: Maintain purchase requisition record Assessment Task 2: Performance Criteria 1: Prepare inventory report as per store policies Performance Criteria 2: Prepare shrinkage report as per store policies Performance Criteria 3: Report stock discrepancies as per store policies Performance Criteria 4: Use various media to communicate effectively.

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Assessors Judgment Guide

Assessors Judgment Guide (to be completed by the Assessor and signed both by the assessor and the candidate after the assessment)

Candidate Details	Name: Registration/Roll Number: Candidate Signature:
Assessment Outcome	COMPETENT ☐ NOT YET COMPETENT ☐ Name of the Assessor:..... Assessor's code:..... Signature of the Assessor:

Assessment Summary (to be filled by the assessor)							
Activity	Method					Result	
Nature of Activity	Written	Oral	Observation	Portfolio	Role Play	Competent	Not Yet Competent
Practical Skill Demonstration			✓				
Knowledge Assessment	✓	✓					
Other Requirement							

Observation Checklist

Each Assessment Task (with performance criteria)

Assessment Task 1

Description of assessment task 1

Prepare purchase requisition

During the practical assessment, candidate demonstrated the following:

Yes

No

Remarks

1. Identify product requirements for store

2. Make purchase requisition as per store policies

3. Submit purchase requisition as per store policies

4. Follow up on purchase requisition

5. Maintain purchase requisition record

Competent ☐

Not Yet Competent ☐

Each Assessment Task (with performance criteria)

Assessment Task 2

Description of assessment task 2

perform following as per instruction given by assessor.

- ✓ Record inventory data
- ✓ Monitor shrinkage
- ✓ Perform stock taking

During the practical assessment, candidate demonstrated the following:

Yes

No

Remarks

1. Prepare inventory report as per store policies

2. Prepare shrinkage report as per store policies

3. Use various media to communicate effectively.

4. Use various media to communicate effectively.

Competent ☐

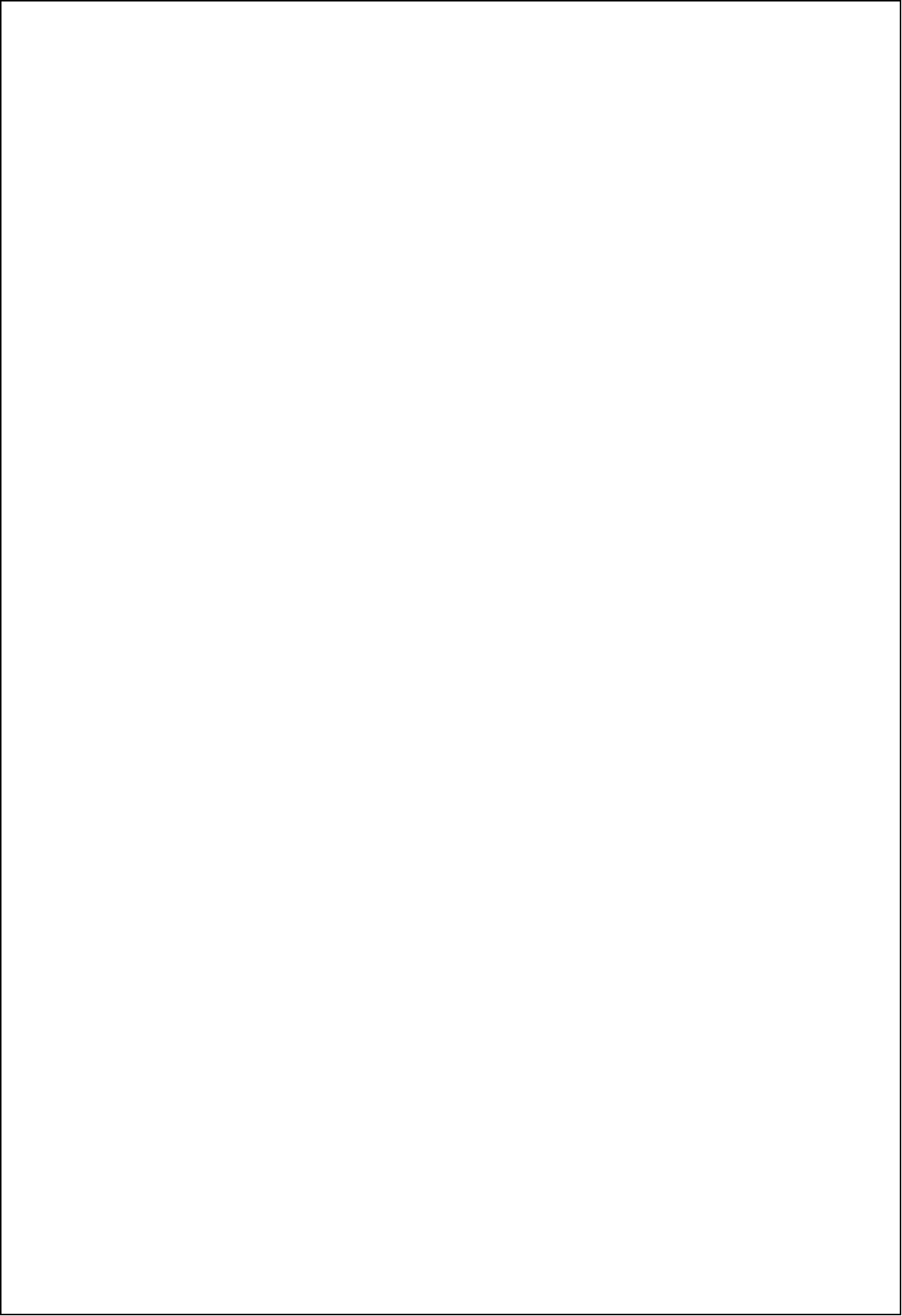
Not Yet Competent ☐

Annexure A

Store, suppose following items are listed a in retail store. You have to maintain minimum stock so that there will be no sales lost and retail store have to purchase it before it run out of stock. Make a purchase requisition of the following items.

S.no	ITEMS	Minimum Stock	Lead Time	Current Stock	Per Day Sales
1.	LIQUID SOAP (100ML)	150 Units	5 days	100 UNITS	10 Units
2.	TISSUE BOX	200 Units	3 days	150 UNITS	20 Units
3.	TISSUE ROLL (1*6)	850 Units	3 Days	500 PACKS	50 Units
4.	PAPER CUPS (1*100)	100 Packs	7 day days	50 PACKS	5 Units
5.	CHOCLATE 50 GRAMS BAR	400 Units	3 Dyas	200 UNITS	50 Units

Answer Sheet



Answer Sheet

Assessment Evidence Guide
for
“Provide Customer
Service”
Level-3



National Vocational & Technical
Training Commission

Title of Qualification: Certificate in Retail Operations Management (Sales Officer-Retail)	CS Code:	Level: 3	Version: 1
Competency Standard Title: Provide Customer Service Communicate at Workplace	Assessment Date (DD/MM/YY):		

Candidate Details	Name: Registration/Roll Number:.....
Guidance for Candidate	To meet this standard, you are required to complete the following tasks within given time (for practical demonstration & assessment): Assessment Task 1: Candidate is required to perform a role play to deal a customer complaint as a customer service representative according to assessor's given scenario Assessment Task 2: Candidate is required to provide a customer service for exchange/return item to a customer according to assessor instructions given scenario And complete: 1. Knowledge assessment test (Written or Oral) 2. Portfolios at the time of assessment
Minimum Evidence Required	During a practical assessment, under observation by an assessor, you will complete: Assessment Task 1: Performance Criteria 1: Record customer's complaints attentively. Performance Criteria 2: Use simple, clear and assertive language during interaction with customers Performance Criteria 3: Gather information about customer's demands & need Performance Criteria 4: Identify customer complaint type/nature by active listening & questioning Performance Criteria 5: Handle customer & his complaints of sensitively, courteously and with discretions Performance Criteria 6: Resolve customer complaints Performance Criteria 7: Communicate verbally and non-verbally using professionalism Assessment Task 2: Performance Criteria 1: Use simple, clear and assertive language during interaction Performance Criteria 2: Gather information about customer's demands & needs Performance Criteria 3: Identify customer complaint type/nature by active listening & questioning Performance Criteria 4: Identify products condition received for return/exchange Performance Criteria 5: Identify store policy for return/exchange Performance Criteria 6: Communicate store policy to customer Performance Criteria 7: Handle return/exchange with sensitively, and courteously Performance Criteria 8: Return/exchange products as per given SOP

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Assessors Judgment Guide

Assessors Judgment Guide (to be completed by the Assessor and signed both by the assessor and the candidate after the assessment)

Candidate Details	Name: Registration/Roll Number: Candidate Signature:
Assessment Outcome	COMPETENT ☐ NOT YET COMPETENT ☐ Name of the Assessor:..... Assessor's code:..... Signature of the Assessor:

Assessment Summary (to be filled by the assessor)							
Activity	Method					Result	
Nature of Activity	Written	Oral	Observation	Portfolio	Role Play	Competent	Not Yet Competent
Practical Skill Demonstration			✓		✓		
Knowledge Assessment	✓	✓					
Other requirement							

Observation Checklist				
Each Assessment Task (with performance criteria)				
Assessment Task 1		Description of assessment task 1 Perform a role play to deal customer complaint as a customer service representative according to assessor's given scenario		
During the practical assessment, candidate demonstrated the following:		Yes	No	Remarks
1.	Record customer's complaints attentively.			
2.	Use simple, clear and assertive language during interaction with customers			
3.	Gather information about customer's demands & need			
4.	Identify customer complaint type/nature by active listening & questioning			
5.	Handle customer & his complaints of sensitively, courteously and with discretions			
6.	Resolve customer complaints			
7.	Communicate verbally and non-verbally using professionalism			
Competent ☐		Not Yet Competent ☐		

Assessment Task 2		Description of assessment task 2 Provide a customer service for exchange/return item to a customer according to assessor's instructions		
During the practical assessment, candidate demonstrated the following:		Yes	No	Remarks
1.	Use simple, clear and assertive language during interaction			
2.	Gather information about customer's demands & needs			
3.	Identify customer complaint type/nature by active listening & questioning			
4.	Identify products condition received for return/exchange			
5.	Identify store policy for return/exchange			
6.	Communicate store policy to customer			
7.	Handle return/exchange with sensitively, and courteously			
8.	Return/exchange products as per given SOP			
Competent ☐		Not Yet Competent ☐		

Scenario 1

You have had a very long day handling different types of customers. You are about to take a rest suddenly an angry client came and start complaining about the shaver, he bought from your outlet. Knowing that product is not faulty, you take a deep breath and start out to deal with him. When he shows you the shaver he bought, you find that he didn't set the machine as per his requirement to achieve the desired shave. If he had simply read the directions, he would have been able to figure this out for himself.

How do you deal with this customer?

Scenario 2

Customer walks into the store, storms over to the Customer Information desk, and tosses a tablet on the counter. He bought it last week, and it won't turn on, despite all he has tried. After some investigation, it turns out that the tablet is defective. He is very upset and is demanding a replacement immediately. He refuses to leave until he feels that his complaint has been addressed.

Return & Refund Policy

Thanks for shopping at Diamond Store.

If you are not entirely satisfied with your purchase, we're here to help.

Returns

- You have 15 calendar days to return an item from the date you received it.
- To be eligible for a return, your item must be unused and in the same condition that you received it.
- Your item must be in the original packaging.
- Your item needs to have the receipt or proof of purchase.
- If product is in OEM warranty policy it will be exchanged after 7 working days

Refunds

- Once we receive your item, we will inspect it and notify you that we have received your returned item.
- We will immediately notify you on the status of your refund after inspecting the item.
- If your return is approved, we will initiate a refund

Assessment Evidence Guide
for
“Perform Retail Finance”
Level-3



**National Vocational & Technical
Training Commission**

Instruction Sheet for the Candidate

Title of Qualification: Certificate in Retail Operations Management (Sales Officer-Retail)	CS Code:	Level: 3	Version: 1
Competency Standard Title: Perform Retail Finance Communicate at workplace	Assessment Date (DD/MM/YY):		

Candidate Details	Name: Registration/Roll Number:.....
Guidance for Candidate	To meet this standard, you are required to complete the following tasks within given time (for practical demonstration & assessment): Assessment Task 1: Candidate is required to process petty cash transactions as per details given in annexure A and as per instructions given by assessor. Assessment Task 2: Candidate is required to perform following as per instruction given by assessor: ✓ Prepare banking documents ✓ Process non-cash transactions ✓ Reconcile invoices for payment to creditor ✓ Prepare invoices for debtors And complete: 1. Knowledge assessment test (Written or Oral) 2. Portfolios at the time of assessment
Minimum Evidence Required	During a practical assessment, under observation by an assessor, you will complete: Assessment Task 1: Performance Criteria 1: Check petty cash claims for approval, accuracy and authenticity before processing. Performance Criteria 2: Balance transactions as per store policy and procedures. Performance Criteria 3: Note irregularities in petty cash claims Performance Criteria 4: Resolve noted irregularities in petty cash claim from concern persons. Performance Criteria 5: Process petty cash transactions as store policies Performance Criteria 6: Record petty cash transactions as per store procedures

Assessment Task 2:

Performance Criteria 1: Balance cashbook entries with counter sales takings

Performance Criteria 2: Compile and balance deposit entries accurately as per store policies.

Performance Criteria 3: List cash and non-cash transactions on banking deposit slips in accordance with the banking institution's guidelines.

Performance Criteria 4: Balance & present credit card transactions to relevant personnel for checking.

Performance Criteria 5: Resolve noted irregularities in non-cash transaction from relevant personnel

Performance Criteria 6: Report identified discrepancies between invoices and delivery and delivery notes to relevant personnel/section.

Performance Criteria 7: Report identified errors in invoice charges to relevant personnel/section for correction/resolution.

Performance Criteria 8: Rectify discrepancies and errors from invoices.

Performance Criteria 9: Process corrected and authorized invoices for payment as per store policy.

Performance Criteria 10: Communicate verbally and non-verbally using professionalism

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Assessors Judgment Guide

Assessors Judgment Guide (to be completed by the Assessor and signed both by the assessor and the candidate after the assessment)

Candidate Details	Name: Registration/Roll Number: Candidate Signature:
Assessment Outcome	COMPETENT ☐ NOT YET COMPETENT ☐ Name of the Assessor:..... Assessor's code:..... Signature of the Assessor:

Assessment Summary (to be filled by the assessor)							
Activity	Method					Result	
Nature of Activity	Written	Oral	Observation	Portfolio	Role Play	Competent	Not Yet Competent
Practical Skill Demonstration			✓				
Knowledge Assessment	✓	✓					
Other Requirement							

Observation Checklist				
Each Assessment Task (with performance criteria)				
Assessment Task 1		Description of assessment task 1 Process petty cash transactions as per details given in annexure A		
During the practical assessment, candidate demonstrated the following:		Yes	No	Remarks
1.	Check petty cash claims for approval, accuracy and authenticity before processing.			
2.	Balance transactions as per store policy and procedures.			
3.	Note irregularities in petty cash claims			
4.	Resolve noted irregularities in petty cash claim from concern persons.			
5.	Process petty cash transactions as per store policies			
6.	Record petty cash transactions as per store procedures			
Competent ☐		Not Yet Competent ☐		

Each Assessment Task (with performance criteria)				
Assessment Task 2		Description of assessment task 2 Perform following as per instruction given by assessor: ✓ Prepare banking documents ✓ Process non-cash transactions ✓ Reconcile invoices for payment to creditor ✓ Prepare invoices for debtors		
During the practical assessment, candidate demonstrated the following:		Yes	No	Remarks
1.	Balance cashbook entries with counter sales takings			
2.	Compile and balance deposit entries accurately as per store policies.			
3.	List cash and non-cash transactions on banking deposit slips in accordance with the banking institution's guidelines.			
4.	Balance & present credit card transactions to relevant personnel for checking.			
5.	Resolve noted irregularities in non-cash transaction from relevant personnel			
6.	Report identified discrepancies between invoices and delivery and delivery notes to relevant personnel/section.			
7.	Report identified errors in invoice charges to relevant personnel/section for correction/resolution.			
8.	Rectify discrepancies and errors from invoices.			
9.	Process corrected and authorized invoices for payment as per store policy.			
10.	Communicate verbally and non-verbally using professionalism			
Competent ☐		Not Yet Competent ☐		

Annexure A

Prepare petty cash book from the following transactions. The opening amount is Rs. 2,000

2019 January

01	Paid cartage	50	
02	STD charges	40	
02	Bus fare	20	
03	Postage	30	
04	Refreshment for employees	80	
06	Courier charges		30
08	Refreshment of customer	30	
10	Cartage		35
15	Tax fare to manager	70	
18	Stationery	65	
20	Bus fare	10	
22	Internet charges	100	
25	Mobile charges		100
27	Postage stamps		200
29	Repair on furniture	105	
30	Laundry expenses	115	
31	Miscellaneous expenses	100	

Assessment Evidence Guide
for
“Manage Omni-channel”
Level-3



**National Vocational & Technical
Training Commission**

Instruction Sheet for the Candidate			
Title of Qualification: Certificate in Retail Operations Management (Sales Officer-Retail)	CS Code:	Level: 3	Version: 1
Competency Standard Title: Manage Omni-channel Communicate at workplace	Assessment Date (DD/MM/YY):		

Candidate Details	Name: Registration/Roll Number:
Guidance for Candidate	To meet this standard, you are required to complete the following tasks within 3 hours (for practical demonstration & assessment): Assessment Task 1: Candidate is required to take order confirmation and coordinate with delivery partner/team as per annexure A as per instruction given by assessor. Assessment Task 2: Candidate is required perform following as per instruction given by assessor: ✓ Pack online orders ✓ Dispatch Online Orders ✓ Manage online orders, returns & exchange ✓ Monitor Fake Orders ✓ Seek Delivery Confirmation & feedback And complete: Knowledge assessment test (Written or Oral) Portfolios at the time of assessment
Minimum Evidence Required	During a practical assessment, under observation by an assessor, you will complete: Assessment Task 1: Performance Criteria 1: Authenticate customer and order details as per Performance Criteria 2: Confirm mode of payment Performance Criteria 3: Confirm delivery address Performance Criteria 4: Use various media to communicate effectively. Performance Criteria 5: Communicate delivery pickup time to dispatch team/partner Performance Criteria 6: Communicate customer information/delivery location to dispatch team/partner

	Assessment Task 2 Performance Criteria 1: Place warranty card or any document Performance Criteria 2: Communication with other departments. Performance Criteria 3: Follow guidelines for packaging Performance Criteria 4: Place Marks & Labels- prepare delivery challan Performance Criteria 5: Arrange pick up from delivery services provider of order Performance Criteria 6: Handover package to delivery services provider Performance Criteria 7: Track orders delivery Performance Criteria 8: Get delivery confirmation from customer Performance Criteria 9: Follow company SOPs for return & exchange. Performance Criteria 10: Follow-up customer complaints and its resolution Performance Criteria 11: Follow-up delivery services provider for payments Performance Criteria 12: Identify and cross check orders fraudulently placed using fake customer identification and payment methods. Performance Criteria 13: Follow the guide line and engage the customer using various technique to verify customer authentications and confirm denied the order Performance Criteria 14: Confirm order is delivered in good condition and exact address. Performance Criteria 15: Record positive/negative feedback from the customer.
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Assessors Judgment Guide

Assessors Judgment Guide (to be completed by the Assessor and signed both by the assessor and the candidate after the assessment)

Candidate Details	Name: Registration/Roll Number: Candidate Signature:.....
Assessment Outcome	COMPETENT ☐ NOT YET COMPETENT ☐ Name of the Assessor: Assessor's code: Signature of the Assessor:

Assessment Summary (to be filled by the assessor)							
Activity	Method					Result	
Nature of Activity	Written	Oral	Observation	Portfolio	Role Play	Competent	Not Yet Competent
Practical Skill Demonstration			✓		✓		
Knowledge Assessment	✓	✓					
Other Requirement							

Observation Checklist			
Each Assessment Task (with performance criteria)			
Assessment Task 1		Description of assessment task 1 Take order confirmation and coordinate with delivery partner/team as per annexure A as per instruction given by assessor.	
During the practical assessment, candidate demonstrated the following:		Yes	No
1.	Authenticate customer and order details as per		
2.	Confirm mode of payment		
3.	Confirm delivery address		
4.	Use various media to communicate effectively.		
5.	Communicate delivery pickup time to dispatch team/partner		
6.	Communicate customer information/delivery location to dispatch team/partner		
Competent ☐		Not Yet Competent ☐	

Assessment Task 2		Description of assessment task 2		
		Perform following as per instruction given by assessor: ✓ Pack online orders ✓ Dispatch Online Orders ✓ Manage online orders, returns & exchange ✓ Monitor Fake Orders ✓ Seek Delivery Confirmation & feedback		
During the practical assessment, candidate demonstrated the following:		Yes	No	Remarks
1.	Place warranty card or any document			
2.	Communication with other departments.			
3.	Follow guidelines for packaging			
4.	Place Marks & Labels- prepare delivery challan			
5.	Arrange pick up from delivery services provider of order			
6.	Handover package to delivery services provider			
7.	Track orders delivery			
8.	Get delivery confirmation from customer			
9.	Follow company SOPs for return & exchange.			
10.	Follow-up customer complaints and its resolution			
11.	Follow-up delivery services provider for payments			
12.	Identify and cross check orders fraudulently placed using fake customer identification and payment methods.			
13.	Follow the guide line and engage the customer using various technique to verify customer authentications and confirm denied the order			
14.	Confirm order is delivered in good condition and exact address.			
15.	Record positive/negative feedback from the customer.			
Competent ☐		Not Yet Competent ☐		

Annexure A

An online gift shop is delivering her services throughout the country. They have 2 shipper partners, for delivering of gift parcel to zone A, they have TRANSCO and for zone B they have NCS. They have received some online orders which are below.

- Clay set from city Nawabshah on 13th street downtown and mode of payment is COD
- Doll house from city Peshawar on street 21st main city near subway and the paid from credit card.
- Car from city Dadu on street 12th suburb area near café and mode of payment COD
- Leather wallet from city Islamabad on 15th street tall towers and mode of payment online transfer to bank account.

S.no	ZONE	CITIES
1.	A	Sukker
2.		Dadu
3.		karachi
4.		Nawabshah
5.	B	Islamabad
6		Peshawar
7.		Lahore

Following is the data of your on-line orders for the month of July;

S No.	Order No.	Tracking No.	Delivery Address	Mode of payment	Shipper	Order Status