Designed to serve as a foundation for competency-based marketing and distributive education curriculum development, this package consists of task lists, performance objectives, and performance guides for use in planning an introductory level retailing course. Job descriptions are given for receiving clerks, stock clerks, and salespersons/sales clerks in retail trade. Following a marketing and distributive education curriculum sequence, a marketing and distributive education occupational task matrix is provided. Presented next are Retailing I tasks, performance objectives, performance guides, instructor's check lists, and references/resources for the following job skill areas: ordering, receiving, storing, inventorying, shipping, stocking, displaying, store operating, cashing, customer servicing, selling, and employee training. Also listed are Retailing I psychomotor and cognitive skill statements as referenced to Interstate Distributive Education Curriculum Consortium (IDECC) learning activity packages and competency numbers. The occupations to which these skill statements pertain are receiving clerk, stock clerk, and salesperson/sales clerk. Completing the package is a list of retailing occupation references. (MW)
RETAILING 1:
a foundation for marketing and distributive education curriculum development

kathryn scruggs smith · project director · june 1981

0 tasks
0 performance objectives
0 performance guides
ACKNOWLEDGEMENTS

Appreciation is expressed to the many individuals who have contributed personal assistance and technical guidance in the development and completion of this project. Without the support of these people, the accomplishment of this project's goals would not have been possible.

Special thanks to Mr. Merle Insko, Curriculum Specialist and Dr. Dwight Cline, Coordinator, Center for Career and Vocational Teacher Education, who have provided assistance, advice, and encouragement and to Mrs. Beth Breeden, Secretary, and Miss Marcia Hardin, Student Secretary, who provided efficient clerical assistance.
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INTRODUCTION

The Center for Career and Vocational Teacher Education has been granted funding through the Bureau of Vocational Education to carry-out a project to develop Marketing and Distributive Education curriculum materials. This project is research-based and seeks to accomplish the following objective:

Prepare task lists, performance objectives, and performance guides for entry-level Retailing occupations which will serve as a foundation for competency based curriculum development.

This objective has been achieved by the following steps:

1. Review, evaluate and convert competencies identified by the Interstate Distributive Education Curriculum Consortium (IDECC), to psychomotor task statements and cognitive skill statements.

2. Reference cognitive statements to corresponding psychomotor task statements.

3. Reference IDECC Competency numbers and Learning Activity Package numbers to psychomotor task statements and cognitive skill statements.

4. Compare task statements identified to references dealing with retailing occupations.

5. Include any additional task statements identified to the Retailing I task list.

6. Convert task statements to performance guides and performance objectives.

7. Reference IDECC Learning Activity Package numbers and competency numbers to task statements, performance guides, and performance objectives.

8. Review task statements, performance guides and performance objectives with a panel of incumbent workers and educators.
RETAILING I JOB DESCRIPTIONS

222.387-050 SHIPPING AND RECEIVING CLERK (clerical)

Verifies and keeps records on incoming and outgoing shipments and prepares items for shipment. Compares identifying information and counts, weighs, or measures items of incoming and outgoing shipments to verify against bills of lading, invoices, orders, or other records. Determines method of shipment, utilizing knowledge of shipping procedures, routes, and rates. Assembles wooden or cardboard containers or selects preassembled containers. Inserts items into containers, using spacers, fillers, and protective padding. Nails covers on wooden crates and binds containers with metal tape, using strapping machine. Stamps, stencils, or glues identifying information and shipping instructions onto crates or containers. Posts weights, shipping charges and affixes postage. Unpacks and examines incoming shipments, rejects damaged items, records shortages, and corresponds with shipper to rectify damages and shortages. Routes items to departments. May operate tier-lift truck or use handtruck to move, convey, or hoist, shipments from shipping-and-receiving platform to storage or work area. May direct others in preparing outgoing and receiving incoming shipments. May perform only shipping or receiving activities and be known as SHIPPING CLERK (clerical) or RECEIVING CLERK (clerical).

299.367-014 STOCK CLERK (retail trade)

Performs any combination of following duties in self-service store: Marks order form to order merchandise based on available shelf space, merchandise on hand, customer demand, or advertised specials. Periodically counts merchandise to take inventory or examines shelves to identify which items need to be reordered or replenished. Unpacks cartons and crates of merchandise, checking invoice against items received. Stamps or attaches prices on merchandise or changes price tags, referring to pricelist. Stocks shelves with new or transferred merchandise. Sets up advertising signs and displays merchandise on shelves, counters, or tables to attract customers and promote sales. Cleans display cases, shelves, and aisles. May itemize and total customer's selection at checkout counter, using cash register, and make change or charge purchases. May pack customers' purchases in bags or cartons. May carry packages to customer's automobile.

222.387-058 STOCK CLERK (clerical) stock checker; stockroom clerk; storekeeper; storeroom clerk; storeroom keeper; store clerk; supply clerk; supply-room clerk.

Receives, stores, and issues equipment, material, supplies, merchandise, foodstuffs, or tools, and compiles stock records in stockroom, warehouse, or storage yard; Counts, sorts, or weighs incoming articles to verify receipt of items on requisition or invoices. Examines stock to
verify conformance to specifications. Stores articles in bins, on floor, or on shelves, according to identifying information, such as style, size, or type of material. Fills orders or issues supplies from stock. Prepares periodic, special, or perpetual inventory of stock. Requisitions articles to fill incoming orders. Compiles reports on use of stock handling equipment, adjustments of inventory counts and stock records, spoilage of or damage to stock, location changes, and refusal of shipments. May mark identifying codes, figures, or letters on articles. May distribute stock among production workers, keeping records of material issued. May make adjustments or repairs to articles carried in stock. May determine methods of storage, identification, and stock location, considering temperature, humidity, height and weight limits, turnover, floor loading capacities, and required space. May cut stock to size to fill order. May move or transport material or supplies to other departments, using hand or industrial truck.

290.477-014 SALES CLERK (retail trade)

Obtains or receives merchandise, totals bill, receives payment, and makes change for customers in such retail stores as tobacco shop, drug store, candy store, or liquor store. Stocks shelves, counters, or tables with merchandise. Sets up advertising displays or arranges merchandise on counters or tables to promote sales. Stamps, marks, or tags price on merchandise. Obtains merchandise requested by customer or receives merchandise selected by customer. Totals price and tax on merchandise selected by customer, using paper and pencil, cash register, or adding machine, to determine bill; receives payment, and makes change. Occasionally calculates sales discount in determining sales slip. Wraps or bags merchandise for customers. Cleans shelves, counters, or tables as necessary. May keep record of sales, prepare inventory of stock, or order merchandise. May be designated according to product sold or type of store.

RETAILING I

A Marketing and Distributive Education Curriculum Sequence

I. Introduction to Marketing and Distributive Education
   A. Retailing: Past, Present, Future
   B. Retailing Occupations
   C. Identification of Career Objectives
   D. Introduction to Retailing Curriculum
   E. Introduction to DECA

II. Marketing and Marketing Functions
   A. Overview of Economic Goods, Services, and Resources
   B. Definition of Marketing and Marketing Vocabulary
   C. Marketing Function
   D. Channels of Distribution

III. Market Pricing
   A. Supply and Demand
   B. Product Utility
   C. Competition
   D. Pricing

IV. Competencies: Receiving Clerk, Stock Clerk, and Salesperson/Sales Clerk Retail Trade
   Major Duty Areas:
   A. Performing Ordering Activities
   B. Performing Receiving Activities
   C. Performing Storing Activities
   D. Performing Inventorying Activities
   E. Performing Shipping Activities
   F. Performing Stocking Activities
   G. Performing Displaying Activities
   H. Performing Store Operating Activities
   I. Performing Cashiering Activities
   J. Performing Customer/Service Activities
   K. Performing Selling Activities
   L. Performing Employee Training Activities

V. Employability Skills Modules
   A. Matching Yourself With Suitable Jobs
   B. Getting Ready For Your Job Search
   C. Preparing A Resume
   D. Finding Job Openings
   E. Writing A Letter of Application
   F. Filling Out A Job Application
   G. Taking Preemployment Tests
   H. Preparing For The Job Interview
   I. Interviewing For The Job
   J. Getting To Know The Job
   K. Presenting An Acceptable Appearance For The Job
   L. Having Good Work Attitudes
   M. Practicing Good Work Habits
N. Using The Telephone
O. Attitudes and Safety
P. Observing General Safety Rules
Q. The Function Of Our Economic System
R. Basic Types Of Business Organization
S. What Our Economy Provides
T. How Our Economy Works

VII. Orientation to Marketing and Distributive Education Coop
### MARKETING AND DISTRIBUTIVE EDUCATION

#### OCCUPATIONAL TASK MATRIX

**JOB CLUSTER:** RETAILING I

<table>
<thead>
<tr>
<th>DUTY AREAS AND TASK LIST</th>
<th>RECEIVING CLERK 222.387-050</th>
<th>STOCK CLERK 299.367-014, 222.387-058</th>
<th>SALESPERSON/SALES CLERK RETAIL TRADE 290.47-014</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERFORMING ORDERING ACTIVITIES</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare Requisition Documents for Supplies; for Merchandise</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Order Merchandise</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Call Merchandise Orders to Wholesalers</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Process Customer's Special Orders</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Record Customer's Request for Merchandise</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**1***
### Performing Receiving Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>RECEIVING CLERK</th>
<th>STOCK CLERK 299.367-014</th>
<th>222.387-050</th>
<th>SALES PERSON/SALES CLERK RETAIL TRADE 250.477-014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark Cartons with Identification Code</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Incoming Merchandise on Receiving Form</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Open Containers with Tools</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Check-in Individual Items of Merchandise</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record and Handle Damaged and Broken Merchandise</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Prepare Overage, Shortage and Discrepancy OSC&amp;D Report</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>13</td>
</tr>
<tr>
<td>Follow-up Non-Delivered or Lost Merchandise</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>File Claims on Carriers or Vendors for Damages, Shortages, Misrouting, Improper Packaging, Substitutions, Lost Orders, Overtages, and/or Back Orders</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**MARKETING AND DISTRIBUTIVE EDUCATION**

**OCCUPATIONAL TASK MATRIX**

**D. O. T. JOB CLASSIFICATIONS**

<table>
<thead>
<tr>
<th>JOB CLUSTER:</th>
<th>RETAILING I</th>
</tr>
</thead>
</table>

**DUTY AREAS AND TASK LIST**

**PERFORMING RECEIVING ACTIVITIES**

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Stock Clerk 299.367-014, 222.387-058</th>
<th>Salesperson/Sales Clerk 290.477-014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Shipments Received to Appropriate Departments</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

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## MARKETING AND DISTRIBUTIVE EDUCATION

### OCCUPATIONAL TASK MATRIX

**JOB CLUSTER:**

**RETAILING I**

### DUTY AREAS AND TASK LIST

#### PERFORMING RECEIVING ACTIVITIES

<table>
<thead>
<tr>
<th>Task</th>
<th>RECEIVING CLERK</th>
<th>STOCK CLERK</th>
<th>SALES PERSON/SALES TRADE CLERK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Invoice in Invoice Register (optional)</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Invoice Against Purchase Order</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Register Invoice on Invoice Apron/Rubber Stamp Form</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Safely Handle Tools and Equipment</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Safely Lift, Carry and Put Down a Load</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Handle Employee/Customer Accidents</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Assist Carrier Unload</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Freight Bill/Delivery Receipt</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Total:** 17 tasks
**MARKETING AND DISTRIBUTIVE EDUCATION**

**OCCUPATIONAL TASK MATRIX**

**D. O. T. JOB CLASSIFICATIONS**

**JOB CLUSTER:** RETAILING I

<table>
<thead>
<tr>
<th>DUTY AREAS AND TASK LIST</th>
<th>RECEIVING CLERK 222.387-050</th>
<th>STOCK CLERK 299.367-014</th>
<th>SALES/PERSON/SALES CLERK 222.387-058</th>
<th>RETAIL TRADE 290.477-014</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PERFORMING STORING ACTIVITIES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintain and Update Master Warehouse Location Plans</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintain and Update Stock Location Directory</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carry-Out Safety Procedures for Stacking/Piling Goods</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Palletize a Unit Load</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Move Goods to Storage Area</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Store Merchandise and Supplies</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Store Items Classified as Sensitive, Hazardous, and/or Flammable</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## MARKETING AND DISTRIBUTIVE EDUCATION

### OCCUPATIONAL TASK MATRIX

#### D. O. T. JOB CLASSIFICATIONS

<table>
<thead>
<tr>
<th>DUTY AREAS AND TASK LIST</th>
<th>RECEIVING CLERK 222.387-050</th>
<th>STOCK CLERK 299.367-014, 222.387-058</th>
<th>SALESPERSON/SALES CLERK RETAIL TRADE 290.457-019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PERFORMING INVENTORYING ACTIVITIES</strong></td>
<td>X X X</td>
<td>X X X</td>
<td></td>
</tr>
<tr>
<td>Prepare Stock for Inventory</td>
<td>X X X</td>
<td>X X X</td>
<td></td>
</tr>
<tr>
<td>Take Inventory</td>
<td>X X X</td>
<td>X X X</td>
<td></td>
</tr>
<tr>
<td>Adjust Inventory Records</td>
<td>X X</td>
<td>X X</td>
<td></td>
</tr>
<tr>
<td>Maintain and Update Stock Record Cards</td>
<td>X X</td>
<td>X X</td>
<td></td>
</tr>
<tr>
<td>Audit Stock Balance and Consumption Reports</td>
<td>X X</td>
<td>X X</td>
<td></td>
</tr>
</tbody>
</table>

---

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---

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# Marketing and Distributive Education

## Occupational Task Matrix

## D.O.T. Job Classifications

### Job Cluster: Retailing I

<table>
<thead>
<tr>
<th>Duty Areas and Task List</th>
<th>Receiving Clerk 222.387-050</th>
<th>Stock Clerk 299.367-014</th>
<th>Salesperson/Sales Clerk 222.387-058</th>
</tr>
</thead>
</table>

- **Performing Shipping Activities**
  - Prepare Goods for Return to Manufacturer: X X X
  - Transfer Stock to Branch Stores: X X

---

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### Occupation Task Matrix

#### D. O. T. Job Classifications

<table>
<thead>
<tr>
<th>Job Cluster:</th>
<th>Retailing I</th>
</tr>
</thead>
</table>

#### Duty Areas and Task List

**Performing Stocking Activities**

<table>
<thead>
<tr>
<th>Task</th>
<th>Receiving Clerk</th>
<th>Stock Clerk 299.367-014</th>
<th>Salesperson/Clark 299.367-058</th>
<th>Retail Trade 299.477-014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Obtain Goods from Stockroom or Warehouse</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deliver Goods to Proper Department</td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check-in Merchandise Received from Stockroom</td>
<td>X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Price Mark Merchandise</td>
<td>X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shelve Merchandise</td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Count Stock to be Advertised</td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Prices on Merchandise</td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total:** 24
## Marketing and Distributive Education

### Occupational Task Matrix

#### D. O. T. Job Classifications

<table>
<thead>
<tr>
<th>JOB CLUSTER: RETAILING 1</th>
<th>DUTY AREAS AND TASK LIST</th>
</tr>
</thead>
</table>

### Performing Displaying Activities

- **Design Point-of-Purchase Signs**
  - RECEIVING CLERK: 222.387-050
  - STOCK CLERK: 299.367-014
  - SALESPERSON/Sales CLERK: 290.477-014
- **Letter Signs**
  - RECEIVING CLERK: 222.387-050
  - STOCK CLERK: 299.367-014
  - SALESPERSON/Sales CLERK: 290.477-014
- **Set Up Manufacturer's Displays**
  - RECEIVING CLERK: 222.387-050
  - STOCK CLERK: 299.367-014
  - SALESPERSON/Sales CLERK: 290.477-014
- **Set Up Counter Displays**
  - RECEIVING CLERK: 222.387-050
  - STOCK CLERK: 299.367-014
  - SALESPERSON/Sales CLERK: 290.477-014
- **Dress Mannequins**
  - RECEIVING CLERK: 222.387-050
  - STOCK CLERK: 299.367-014
  - SALESPERSON/Sales CLERK: 290.477-014
- **Set Up Window Displays**
  - RECEIVING CLERK: 222.387-050
  - STOCK CLERK: 299.367-014
  - SALESPERSON/Sales CLERK: 290.477-014
- **Set Up Mass Displays**
  - RECEIVING CLERK: 222.387-050
  - STOCK CLERK: 299.367-014
  - SALESPERSON/Sales CLERK: 290.477-014
- **Tidy Up Displays**
  - RECEIVING CLERK: 222.387-050
  - STOCK CLERK: 299.367-014
  - SALESPERSON/Sales CLERK: 290.477-014
**MARKETING AND DISTRIBUTIVE EDUCATION**

**OCCUPATIONAL TASK MATRIX**

**JOB CLUSTER:** RETAILING I

**DUTY AREAS AND TASK LIST**

<table>
<thead>
<tr>
<th>PERFORMING STORE OPERATING ACTIVITIES</th>
<th>RECEIVING CLERK 222.387-050</th>
<th>STOCK CLERK 299.367-014, 222.387-058</th>
<th>SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Store</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare Check-Out Area for Business Day</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare Cash Drawer</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fill Out Credit Application Form</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receipt Customer's Accounts Receivable</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Balance Cash Register</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Close Out Department</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fill Out Bank Deposit Forms</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Performing Cashiering Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Receiving Clerk</th>
<th>Stock Clerk</th>
<th>Salesperson/SALES CLERK</th>
<th>Retail Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Bank Card Sales Transactions</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process Charge Sales Transactions</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process Cash Sales Transactions</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accept Valid Consumer Redeemable Coupons</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Determine Amount of Sales Tax</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Authorize Customers' Checks</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make Change</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Issue Trading Stamps</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Marketing and Distributive Education

## Occupational Task Matrix

### Job Cluster: Retailing I

**Duty Areas and Task List**

<table>
<thead>
<tr>
<th>Performing Customer Service Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer Customer Inquiries Concerning Directions; Concerning Customer Facilities; Concerning Store Policy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Receiving Clerk</th>
<th>Stock Clerk</th>
<th>Salesperson/SALES CLERK Retail Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>222.387-050</td>
<td>299.367-014</td>
<td>222.387-058</td>
</tr>
</tbody>
</table>

**D. O. T. Job Classifications**

- [ ]

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33
## MARKETING AND DISTRIBUTIVE EDUCATION

### OCCUPATIONAL TASK MATRIX

**JOB CLUSTER:** RETAILING I

<table>
<thead>
<tr>
<th>DUTY AREAS AND TASK LIST</th>
<th>RECEIVING CLERK 222.387-050</th>
<th>STOCK CLERK 299.367-014, 222.387-058</th>
<th>SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performing Selling Activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>--Handle Customer Objectives</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--Handle Difficult Customers</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--Suggest Substitute Merchandise</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--Suggest Advertised Merchandise</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--Close the Sale</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--Suggest Accessory Items</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrate Merchandise</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Job Cluster: Retailing I

#### Performing Employee Training Activities

<table>
<thead>
<tr>
<th></th>
<th>Receiving Clerk</th>
<th>Stock Clerk</th>
<th>Salesperson/Trade</th>
<th>Retail Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assist with Training/Sponsoring New Employees</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
DUTY AREA:
PERFORMING ORDERING ACTIVITIES
Retailing I:  
A Foundation for Marketing and 
Distributive Education Curriculum Development

By
Kathryn Scruggs Smith  
Project Director

June, 1981
Center for Career and Vocational Teacher Education
Western Kentucky University  
Bowling Green, Kentucky  
42101

Project Number:  
4429

The Research reported herein was performed pursuant to a contract with the Commonwealth of Kentucky, State Department of Education, Bureau of Vocational Education. Contractors undertaking projects under such sponsorship are encouraged to express freely their professional judgement in the conduct of the project. Points of view or opinions stated not, therefore, necessarily represent official State Department of Education position or policy.
RETAILING I

TASK: Prepare Requisition Documents For Supplies; For Merchandise

PERFORMANCE OBJECTIVE: Given stock records, blank requisition forms, catalogs of suppliers of goods; survey stock records to determine items needed, and prepare requisitions. The requisition documents must be fully completed on the proper form and writing must be legible.

PERFORMANCE GUIDE:

1. List items needed after surveying inventory records.
2. Obtain blank requisition forms.
3. Identify suppliers of goods needed.
4. Prepare requisition noting:
   a. Quantity
   b. Stock number
   c. Description
5. Keep your copy and forward original and other copies to appropriate store personnel.
References/Resources:

VTECS Warehouse Worker 58/73 Prepare Requisition Documents

IDECC 635/013 Know procedures for requisitioning and obtaining supplies
RETAILING I

TASK: Order Merchandise

PERFORMANCE OBJECTIVE: Given a purchase order form and a want slip or requisition for merchandise, fill out the purchase order form. The completed purchase order should contain all the required information in the appropriate spaces.

PERFORMANCE GUIDE:

1. Take care to insure accuracy of the order.
2. Read the requisition or want book to determine what merchandise to order.
3. Write vendor's name and address on purchase order.
4. Write the following information on the order form:
   a. Name of the store
   b. Complete address
   c. Department identification
   d. Description of the merchandise including size, color, style, classification
   e. Requested shipping and delivery dates
   f. Condition of the order
   g. Method of shipment (may include specific carrier)
   h. Other special instructions
5. Mail completed order to vendor.
References/Resources:

VTECS  Fashion Salesperson 20/34  Order merchandise
IDECC  433/Mdse 9  Place orders of merchandise
  430/Mdse 19  Know procedures for ordering merchandise
  439/Mdse 19  Prepare merchandise order forms
WHOLESALE TRADE

RETAILING I

TASK: Call Merchandise Orders To Wholesalers

PERFORMANCE OBJECTIVE: Given a shop order for merchandise that is to be called to a wholesaler and access to a telephone, call the wholesaler and place the order. All applicable criteria on the instructor's checklist must be acceptably completed.

PERFORMANCE GUIDE:

1. Read the order to determine that all merchandise is clearly listed.
2. Place the call to the wholesaler.
3. Identify self and name of business to order clerk.
4. Place the order by giving the order clerk:
   a. Name of merchandise
   b. Quantity wanted
5. Ask order clerk to verify order by reading it back.
6. Note any item that wholesaler cannot supply.
7. Be prepared to make second choices.
8. Specify pick up or delivery.
9. Indicate date of order.
<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING *</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Identified self and name of business to the wholesaler's order clerk?</td>
<td></td>
</tr>
<tr>
<td>2. Placed the order by giving the order clerk the name of each item and the quantity needed?</td>
<td></td>
</tr>
<tr>
<td>3. Asked the order clerk to verify the complete order?</td>
<td></td>
</tr>
<tr>
<td>4. Noted each item that was not available?</td>
<td></td>
</tr>
<tr>
<td>5. Requested substitutes for unavailable items?</td>
<td></td>
</tr>
<tr>
<td>6. Specified if the order was to be picked up or delivered?</td>
<td></td>
</tr>
<tr>
<td>7. Requested and noted a delivery date for the order?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:

VTECS Retail Flowershop Salesperson 44/108 All merchandise orders to wholesalers

IDECC 433/Mdse 9 Place orders of merchandise
RETAILING I

TASK: Process Customer's Special Orders

PERFORMANCE OBJECTIVE: Provided a customer who wishes to make a special order and a special request order form, process the customer's special order request. All required information must be included on the order form. (The register reading and the amount of the deposit on the order form must be equal).

PERFORMANCE GUIDE:

1. Ask the customer for the information that is required for completing the special order form:
   a. Customer's name, address and phone number
   b. A description of the merchandise
      - Color and size
      - Number of items
      - Stock and style number
2. Read the information back to the customer to validate it.
3. Tell the customer the anticipated date of arrival of the merchandise.
4. If necessary, ask the customer for signature.
5. Send the special order request to the designated store employee.

*Note: 1. Determine if merchandise requested is available
       2. Inform customer of cost of merchandise
       3. Prepare special order form
       4. Secure deposit (Ring up deposit and put it in cash register) if applicable
       5. Attach cash register receipt to copy of special order form and give it to customer
       6. Put copy of special order in register
References/Resources:

VTECS  Fashion Salesperson 35/51  Process customers' special order

Hardware Salesperson 18/31  Process customers' special order

IDECC  464/Mdse 19  Handle special order of merchandise

404/Mdse 19  Know how to handle special order of merchandise
RETAILING

TASK: Record Customer's Request For Merchandise

PERFORMANCE OBJECTIVE: Given a special request for merchandise and forms for recording it, record the customer's request for merchandise. The request form must include the following information: status of merchandise (special order, new, out-of-stock), customer's name and address, description of merchandise and approximate delivery date.

PERFORMANCE GUIDE:

1. Check the appropriate box or boxes:
   a. special order
   b. new item
   c. out-of-stock

2. Write the customer's name, address and phone number.

3. Write a description of the merchandise:
   a. item
   b. brand
   c. size
   d. quantity

4. Write approximate date of delivery.
DUTY AREA:
PERFORMING RECEIVING ACTIVITIES
RETAILING I

TASK: Enter Invoice In Invoice Register (Optional)

PERFORMANCE OBJECTIVE: Given an invoice and an invoice register, enter the invoice on the invoice register. All information must be correctly and legibly entered on the invoice register.

PERFORMANCE GUIDE:

1. Date stamp the invoice.
2. Record invoice number and date.
3. Record the source of the merchandise.
4. Record the amount of the invoice.
5. Send/file invoice in appropriate location.
RETAILING I

TASK: Check Invoice Against Purchase Order

PERFORMANCE OBJECTIVE: Given shipping records and current purchase orders for incoming goods, verify the records and content of the order. If the invoice and the purchase order for the shipment do not match, an OS&D report must be completed without error and/or all discrepancies must be noted on the invoice.

PERFORMANCE GUIDE:

1. Obtain current and open purchase orders.
2. Obtain packing list.
3. Check and compute figures.
4. Verify packing list against goods received.
5. Verify packing list against purchase orders.
6. Note any back orders.
7. Complete an overage, shortage and damaged (OS&D) report if necessary.
References/Resources:

VTECS  Warehouse Worker 28/42  Check invoice against purchase order
RETAINING I

TASK: Register Invoice On Invoice Apron/Rubber Stamp Form

PERFORMANCE OBJECTIVE: Given an invoice and an invoice apron/rubber stamp form, register the invoice. All applicable information must be correctly and legibly entered on the invoice apron/rubber stamp form.

PERFORMANCE GUIDE:

1. Attach the invoice apron to the invoice or stamp back of invoice with rubber-stamp form.
2. Check the invoice with the original purchase order for quantity, type, price, terms and routing.
3. Note any differences on the invoice apron/rubber stamp form.
4. Record department number, order number, terms on the order and the invoice, routing and the date checked.
5. Note the amount, date, invoice number and balance due on orders shown incomplete by the invoice (if necessary).
6. Initial or sign.
7. File the purchase order.
8. Place the invoice on file to await receipt of the merchandise. (Optional, this procedure is used when invoice is received and checked before order is received).
9. Record the receiving number and the date the shipment is checked.
References/Resources:

RECEIVING, CHECKING AND MARKING. Kelly Ritch. Distributive Education Instructional Materials Laboratory, University of Texas at Austin, 1969.


RETAILING I

TASK: Safely Handle Tools And Equipment

PERFORMANCE OBJECTIVE: Given a variety of case studies indicate the correct safety procedures performed in each situation. Each case must be answered correctly.

PERFORMANCE GUIDE:

<table>
<thead>
<tr>
<th>Store Equipment and Facilities</th>
<th>Accident Prevention and Care</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Bailing or Trash Room</td>
<td>a. Packing materials, such as straw and excelsior, removed immediately or in metal can with tight cover</td>
</tr>
<tr>
<td>a. Waste Paper</td>
<td>b. Floor clean</td>
</tr>
<tr>
<td>b. Floor</td>
<td>c. Cartons flattened</td>
</tr>
<tr>
<td>c. Cartons</td>
<td>d. Metal separated from burnable materials</td>
</tr>
<tr>
<td>d. Metal materials</td>
<td>e. Fire door open</td>
</tr>
<tr>
<td>e. Fire door</td>
<td>f. Door way unobstructed</td>
</tr>
<tr>
<td>f. Door way</td>
<td></td>
</tr>
<tr>
<td>2. Carton Openers</td>
<td>a. Used for opening cartons only</td>
</tr>
<tr>
<td></td>
<td>b. No other objects are to be used to open cartons</td>
</tr>
<tr>
<td>3. Ceiling and Walls</td>
<td>a. No holes</td>
</tr>
<tr>
<td></td>
<td>b. No broken or cracked plaster, tile, or vitriolite</td>
</tr>
<tr>
<td></td>
<td>c. No peeling paint</td>
</tr>
<tr>
<td></td>
<td>d. No broken windows</td>
</tr>
<tr>
<td>4. Chairs and Tables</td>
<td>a. No broken area or sharp edges on or under chairs and tables</td>
</tr>
<tr>
<td></td>
<td>b. Free of splinters and gum</td>
</tr>
<tr>
<td></td>
<td>c. No holes in seats</td>
</tr>
<tr>
<td></td>
<td>d. No broken springs</td>
</tr>
<tr>
<td>5. Counter Displays</td>
<td>a. Shelves and racks in good condition; adequately braced, sufficiently wide, and lipped to hold merchandise</td>
</tr>
<tr>
<td></td>
<td>b. Display materials secure; removed to fixture room when not in use</td>
</tr>
<tr>
<td></td>
<td>c. Pet cages protected with wire mesh where necessary</td>
</tr>
<tr>
<td>14. Fixture Room and Storage Area</td>
<td>Accident Prevention and Care (Cont)</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>a. Fixtures</td>
<td>a. Fixtures orderly and glass sized within bins</td>
</tr>
<tr>
<td>b. Floor</td>
<td>b. Floor clean</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>15. Floors and Aisles</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Floors</td>
<td>a. Keep aisles clear</td>
</tr>
<tr>
<td>b. Drain</td>
<td>b. No protruding objects</td>
</tr>
<tr>
<td></td>
<td>c. No holes in flooring</td>
</tr>
<tr>
<td></td>
<td>d. Drains free so no backflow occurs</td>
</tr>
<tr>
<td></td>
<td>e. Aisles not blocked by stock, boxes, tools, or merchandise</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>16. Freight Receiving Area</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Stairways</td>
<td>a. Stairways, ladders, and chutes in good condition</td>
</tr>
<tr>
<td>b. Ladders</td>
<td>b. No broken steps, rungs, etc.</td>
</tr>
<tr>
<td>c. Chutes</td>
<td>c. Gates protecting openings closed when chute is not used</td>
</tr>
<tr>
<td>d. Gates</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>17. Heating and Air Conditioning</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Boiler, fan, air conditioning, motor, meter, and main electric switch assembly</td>
<td></td>
</tr>
<tr>
<td>b. Rooms not used for storage</td>
<td>rooms or areas clean and free of combustibles</td>
</tr>
<tr>
<td>c. Combustibles safe distance from areas</td>
<td></td>
</tr>
<tr>
<td>d. No missing switch or terminal boxes, plates, or covers</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>18. Ladders and Stools</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Equipment secure, adequately braced</td>
<td></td>
</tr>
<tr>
<td>b. No broken steps, rungs, or platforms</td>
<td></td>
</tr>
<tr>
<td>c. Proper devices provided and used for climbing</td>
<td></td>
</tr>
<tr>
<td>d. Stored in designated place when not in use</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>19. Outside Areas and Roof</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Alley, window wells, drive, yard, and roof in good condition; free from rubbish, weeds, etc.</td>
<td></td>
</tr>
<tr>
<td>b. Mouldings, sign and walls secure and unbroken</td>
<td></td>
</tr>
<tr>
<td>c. Refuse in covered metal containers</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>20. Personnel Facilities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Coat, locker, restroom areas, and lavatories properly equipped, clean, and maintained on schedule</td>
<td></td>
</tr>
<tr>
<td>b. No damaged or broken furniture and fixtures</td>
<td></td>
</tr>
<tr>
<td>c. Fixtures secure</td>
<td></td>
</tr>
<tr>
<td>d. Plumbing in working order; not broken or loose parts</td>
<td></td>
</tr>
<tr>
<td>e. Proper lighting; burned out bulbs replaced</td>
<td></td>
</tr>
<tr>
<td>Store Equipment and Facilities (Cont)</td>
<td>Accident Prevention and Care (Cont)</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>------------------------------------</td>
</tr>
<tr>
<td>21. Shopping Carts</td>
<td>a. Clean</td>
</tr>
<tr>
<td></td>
<td>b. In good condition</td>
</tr>
<tr>
<td></td>
<td>c. Accident prevention signs properly posted on all carts</td>
</tr>
<tr>
<td>22. Sidewalks, Entrances, and Awnings</td>
<td>a. Sidewalks and entrances free from tripping hazards</td>
</tr>
<tr>
<td></td>
<td>b. Flow of traffic unobstructed</td>
</tr>
<tr>
<td></td>
<td>c. Doors in good condition and level with walks</td>
</tr>
<tr>
<td></td>
<td>d. Awnings in good condition and secure</td>
</tr>
<tr>
<td></td>
<td>e. Show windows and framing secure</td>
</tr>
<tr>
<td>23. Sprinkler System</td>
<td>a. Pipe secured to ceiling and free of hanging or stored objects</td>
</tr>
<tr>
<td></td>
<td>b. Shut-off valves sealed, open, labeled, and readily accessible</td>
</tr>
<tr>
<td>24. Stairways</td>
<td>a. Treaded and in good condition</td>
</tr>
<tr>
<td></td>
<td>b. Handrails in good condition and secure</td>
</tr>
<tr>
<td></td>
<td>c. Free-flowing traffic; no obstructions</td>
</tr>
<tr>
<td></td>
<td>d. Signs reading &quot;Caution--Please Use Handrail&quot; posted as instructed</td>
</tr>
<tr>
<td>25. Stock Room</td>
<td>a. Never reach higher than eye level</td>
</tr>
<tr>
<td>a. Shelves</td>
<td>b. Never lift objects heavier than safety permits</td>
</tr>
<tr>
<td>b. Bins</td>
<td>c. Shelves secure</td>
</tr>
<tr>
<td></td>
<td>d. No top-heavy merchandise</td>
</tr>
<tr>
<td></td>
<td>e. No objects should be protruding from the bins</td>
</tr>
<tr>
<td>26. Trucks, Carts, and Baskets</td>
<td>a. None broken</td>
</tr>
<tr>
<td></td>
<td>b. Clean</td>
</tr>
<tr>
<td></td>
<td>c. Free from splinters, protruding edges or nails; no loose or missing bolts and wheels</td>
</tr>
<tr>
<td>27. Vending Machines</td>
<td>a. Machines level with floor</td>
</tr>
<tr>
<td></td>
<td>b. Not obstructing traffic</td>
</tr>
<tr>
<td></td>
<td>c. Machines and areas around and underneath clean</td>
</tr>
<tr>
<td></td>
<td>d. Coin-operated devices properly grounded</td>
</tr>
<tr>
<td></td>
<td>e. Machines in working order</td>
</tr>
</tbody>
</table>
PERFORMANCE GUIDE (Cont):
Store Equipment and Facilities (Cont)

28. Moving Equipment

Accident Prevention and Care (Cont)

a. Place the load so it will be carried by the axle and will not slide off.
b. Place heavy objects on bottom.
c. Build a firm straight, well balanced stack that you can see over and/or around.
d. Keep the truck in front of you, never walk backwards down an incline.
e. Move a safe speed.
References/Resources:

IDECC 732/02  Carry-out safety procedures for handling equipment and stock arrangement.

615/02  Know how to carry-out safety procedures for handling equipment and stock arrangement.

696/01  Handle and care for store equipment

RECEIVING, CHECKING AND MARKING. Kelly Ritch. Instructional Materials Laboratory, University of Texas at Austin, 1969.

RETAILING I

TASK: Safely Lift, Carry And Put Down A Load

PERFORMANCE OBJECTIVE: Provided a load, safely lift, carry and put down the load. All items on the instructor's checklist must be performed without error.

PERFORMANCE GUIDE:

Procedures for Lifting:
1. Consider the size, weight, and shape of the object.
2. Give the object a trail lift (one corner); get help if necessary.
3. Firmly balance your body by spreading your feet 8 to 10 inches apart (one foot slightly ahead of the other).
4. Place your feet close to the object (straddle one corner, option) and bend your knees.
5. Crouch down, keeping your back straight.
6. Get a good grip on the object, holding the bottom corner nearest your body. (You may also grip the object on the opposite top and bottom corners)
7. Lift straight up with your leg muscles.
8. Hold the object close to your body.

*Note: When lifting go down almost to the floor on one knee if necessary, but do not go into a full squat. Straightening up from a full squat requires almost twice the effort.

Procedures for Carrying:
1. Check the load for size, loose parts, parts sticking out, etc.
2. Check route for obstacles, doors, stairs, and a place where the load may be set down so the carrier can rest.
3. Lift the load.
4. Carry the load close to your body.

*Note: Never carry a load that cannot be seen over or around.

Carry long objects over the shoulder, with the front end as high as possible.

Many circular objects can be tilted easily and rolled on edge.
PERFORMANCE GUIDE (Cont.)
Procedures for Putting a Load Down:
1. Hold the load close to your body.
2. Bend your knees (back straight) and lower the load with your leg muscles.
3. Set down one corner away from your fingers.
4. Lower the rest of the load.
5. Push objects on tables or shelves with your arms or body.
### Checklist for Lifting:

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checklist for Lifting:</td>
<td>Acceptable</td>
</tr>
<tr>
<td>1. Considered the size, weight, and shape of object?</td>
<td></td>
</tr>
<tr>
<td>2. Gave object a trial lift (requested help if necessary)?</td>
<td></td>
</tr>
<tr>
<td>3. Balanced body?</td>
<td></td>
</tr>
<tr>
<td>4. Placed feet close to object and bent knees?</td>
<td></td>
</tr>
<tr>
<td>5. Crouched down and kept back straight?</td>
<td></td>
</tr>
<tr>
<td>6. Secured a good grip?</td>
<td></td>
</tr>
<tr>
<td>7. Lifted up with leg muscles?</td>
<td></td>
</tr>
<tr>
<td>8. Held object close to body?</td>
<td></td>
</tr>
</tbody>
</table>

### Checklist for Carrying:

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checklist for Carrying:</td>
<td>Acceptable</td>
</tr>
<tr>
<td>1. Checked the load for size, loose parts and parts sticking out?</td>
<td></td>
</tr>
<tr>
<td>2. Checked the route.</td>
<td></td>
</tr>
<tr>
<td>3. Safely lifted the load.</td>
<td></td>
</tr>
</tbody>
</table>
### Checklist for Carrying (Cont.)

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Carried the load close to the body?</td>
<td></td>
</tr>
</tbody>
</table>

### Checklist for Putting a Load Down:

| 1. Held load close to body?                  |        |
| 2. Bent knees?                               |        |
| 3. Lowered load with leg muscles?            |        |
| 4. Set down one corner away from fingers?    |        |
| 5. Lowered the rest of the load?             |        |
References/Resources:

WAREHOUSING. Melvin Hatchett. Instructional Materials Services, Division of Extension, The University of Texas at Austin, 1974.

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1979.


RECEIVING, CHECKING, AND MARKING. Kelly Ritch. Instructional Materials Laboratory, University of Texas at Austin 1969.

RETAILING I

TASK: Handle Employee/Customer Accidents

PERFORMANCE OBJECTIVE: Given a variety of case studies indicate the correct safety procedures performed in each situation. Each case must be answered correctly.

PERFORMANCE GUIDE:

Customer Accidents

a. Immediately report and if possible, treat simple cuts and burns of customers.

b. If customer falls or faints or is unconscious, do not move him but summon aid quickly.

c. Heat stroke and heart attack or shock may be aggravated by moving the person.

d. If injury is serious, keep customer quiet and summon aid immediately.

e. Make full report of accident if you witnessed it; otherwise, ask customer for details.

f. Never blame the store or equipment for accident. Such testimony may prove damaging in case of suit.

g. Follow store rules where damage is done to automobile or clothing or personal property. Usually this is handled by store manager, owner, or supervisor.

h. Do not volunteer personal opinions concerning cause of accident. Report the facts as you saw them and/or customer told you.

i. If there are other witnesses to the accident, get their testimonies on the proper accident form.
PERFORMANCE GUIDE (Cont.)

Employee Accidents

a. Always report any accident to
   yourself or other employee.

b. Always treat any cut or burn
   regardless of how slight.
   Infection can be serious later on.

c. Insurance companies require reports
   on all accidents.

d. If a store nurse or accident station
   is available, always go there for
   inspection of an injury.

e. Report details, nature of accident,
   cause, when and where it occurred.

f. Use regular accident report blank
   supplied by store.

Serious Employee or Customer
Accidents

a. Summon aid, nurse, doctor, first aid
   kit, or supervisor.

b. Keep customer quiet, warm, free from
   curious onlookers and crowding.

c. Get all the details and facts that
   are immediately apparent, especially
   from any witnesses.

d. Prevent moving the person until
   competent aid is summoned.

e. Direct customer traffic around and
   away from scene of accident.
References/Resources:

VTECS  Cashier Checker 34/101  Report accidents involving customer

IDECC  02/660  Know how to handle accidents
RETAILING I

TASK: Assist Carrier Unload

PERFORMANCE OBJECTIVE: Given loaded carrier, materials handling equipment and necessary forms and shipping records, determine proper equipment to be used and assist carrier unload. All items must be unloaded without damages or injury to personnel and all discrepancies must be noted on shipping document(s).

PERFORMANCE GUIDE:

1. Obtain shipping documents.
2. Request personnel to assist carrier.
4. Check vehicle wheels.
5. Utilize safety jacks as needed.
6. Determine weight of goods from freight bill.
7. Choose equipment based on size and weight of goods.
8. Wear gloves if needed.
10. Check goods for damages.
11. Verify proper goods being received.
13. Note any discrepancies on shipping documents.
References/Resources:

VTECS  Warehouse Worker 27/41  Assist carrier unload

IDECC  669/04  Know how to unload a delivery truck
RETAILING I

TASK: Check Freight Bill/Delivery Receipt

PERFORMANCE OBJECTIVE: Given a freight bill/delivery receipt, check the freight bill/delivery receipt. Incorrect shipments must be refused and any discrepancies noted on the freight bill/delivery receipt and invoice/invoice apron and/or purchase order.

PERFORMANCE GUIDE:
1. Check consignee name.
2. Check supplier name.
3. Get the invoice/invoice apron and/or purchase order.
4. Compare invoice/invoice apron and/or purchase order with freight bill to assure that the goods being delivered are those the store ordered.
5. Note any discrepancies.
6. Refuse incorrect shipments.
References/Resources:

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and
RETAILING I

TASK: Mark Cartons With Identification Code

PERFORMANCE OBJECTIVE: Given an incoming shipment of merchandise, mark the cartons with an identification code. Each carton must be legibly marked with receiving number, department number or warehouse storage number and number of pieces in the shipment. The receiving form must be attached to one of the pieces in the shipment.

PERFORMANCE GUIDE:

1. Mark each carton with the official receiving number.
2. Mark each carton with the number of the department or warehouse area to receive the goods (or the day of delivery).
3. Mark each carton with the number of pieces in the order.
4. Attach copies of the receiving form (and the invoice/invoice apron - optional) to one of the pieces in the order.
References/Resources:

WAREHOUSING. Melvin S. Hatchett. Instructional Materials Services, University of Texas at Austin, 1974.


RECEIVING, CHECKING, AND MARKING. Kelly Ritch. Distributive Education Instructional Materials Laboratory, University of Texas at Austin, 1969.

VTECS Warehouse Worker 33/47 Arrange goods according to identification codes
RETAILING I

TASK: Record Incoming Merchandise On Receiving Form

PERFORMANCE OBJECTIVE: Provided a shipment of incoming merchandise and a receiving record, record incoming merchandise on the receiving record. The incoming order must be spot checked, the receiving record correctly completed and the order and all documents forwarded to the proper store employees.

PERFORMANCE GUIDE:

1. Record the shipper's name and where the merchandise was shipped from.
2. Record the carrier's name and number.
3. Record freight charges.
4. Record department number.
5. Count and record number of pieces received.
6. Check number of pieces received with number indicated on freight bill, invoice, and/or purchase order and note any discrepancy on the receiving record and the freight bill.
7. Spot check cartons for damages and note on the receiving record and the freight bill.
8. Record the weight of the shipment.
9. Spot check the weight of the shipment and indicate any discrepancy on the freight bill and the receiving record.
10. Record the date shipped and date received.
11. Record the invoice number and the receiving number.
12. Sign the freight bill and receiving record.
13. Keep pieces of one order together.
14. Send the freight bill to traffic office or business office.
15. Route/move merchandise and forms to the checking/marking area.
16. Secure the driver's signature. (Have driver initial any discrepancy)
References/Resources:


RECEIVING, CHECKING AND MARKING. Kelly Ritch. Distributive Education Instructional Materials Laboratory, University of Texas at Austin, 1969.

VTECS Warehouse Worker 31/45 Record carriers name and number on receiving report

Warehouse Worker 29/43 Check number of cartons against bill of lading, freight bill or manifest

Warehouse Worker 32/46 Spot check cartons for damage

Hardware Store Salesperson 22/35 Receive incoming merchandise

IDECC 641/05 Know receiving bookkeeping procedures

647/05 Know receiving terminology

702/04 Route merchandise to selling department or reserve stockroom

707/07 Know how to handle incorrect amounts and/or types of merchandise
RETAILING I

TASK: Open Containers With Tools

PERFORMANCE OBJECTIVE: Given a selection of goods to be opened, tools for opening containers; select proper tools, open containers carefully, remove all packaging materials from area, and return tools to proper location. The cartons/containers must be opened without damaging goods or inflicting self injury.

PERFORMANCE GUIDE:

1. Identify type of container.
2. Select proper tools.
4. Glued corrugated containers: Cut three edges at top of container with a short, sharp blade. Fold cover back.
5. Nailed wooden container: Insert tool to loosen cover board. Pry upward. Hammer cover board down as soon as nailhead is forced up. Remove nails. Empty and place cover board and nails inside container.
7. Return tools to proper location
8. Dispose of waste

CAUTION:

a. Bands and wires are tied under pressure and will fly up and out when cut. Secure banding before cutting. Extreme care must be used when cutting band or wire. The loose ends can easily put out an eye or cause other serious injury.

b. Do not insert cutting blade too far into container so that contents of box are damaged. Cut away from body.

c. Care should be exercised with sealing tapes. The edges are often sharp and may easily cut the skin.

d. If a flap is stapled, care should be exercised in forcing the flap open or back. The staples may snag and cut fingers, hands or arms.

e. Wear gloves.
References/Resources:


RECEIVING, CHECKING AND MARKING. Kelly Ritch. Distributive Education Instructional Materials Laboratory, University of Texas at Austin, 1969.

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1979.

VTECS Warehouse Worker 45/60. Open containers with proper tools.
RETAILING I

TASK: Check-In Individual Items Of Merchandise

PERFORMANCE OBJECTIVE: Provided a shipment of merchandise, check each item. All applicable item on the instructor's checklist must be completed.

PERFORMANCE GUIDE:

1. Group all containers for one order according to the receiving number/identification code.
2. Gather the purchase order, invoice/invoice apron, and/or the packing list for each order.
3. Locate container marked "Packing List Enclosed" and open it first.
4. Open containers with proper tools and check for improper packing and packaging.
5. Remove merchandise from container and sort by stock number.
6. Classify order.
7. Check packing list/invoice against the original purchase order.
8. Check merchandise against the invoice for quantity, quality, model, size, color, style, grade, freshness and damage.
9. Write the count on the invoice.
10. Note any discrepancies on the invoice/invoice apron, packing list and purchase order. (overage, shortage, description of damage, etc.)
11. Sign or initial invoice/invoice apron and packing list.
12. Route/move merchandise and forms to the marking department.
<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Grouped containers according to receiving number/identification code?</td>
<td></td>
</tr>
<tr>
<td>2. Gathered necessary documents?</td>
<td></td>
</tr>
<tr>
<td>3. Located and opened container marked &quot;Packing List Enclosed&quot;?</td>
<td></td>
</tr>
<tr>
<td>4. Safely opened containers using proper tools?</td>
<td></td>
</tr>
<tr>
<td>5. Checked containers for proper packing or packaging?</td>
<td></td>
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<tr>
<td>6. Removed merchandise?</td>
<td></td>
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<tr>
<td>7. Sorted merchandise by stock number?</td>
<td></td>
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<tr>
<td>8. Classified order?</td>
<td></td>
</tr>
<tr>
<td>9. Checked packing list/invoice against original purchase order?</td>
<td></td>
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<tr>
<td>10. Checked merchandise for:</td>
<td></td>
</tr>
<tr>
<td>- quantity</td>
<td></td>
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<tr>
<td>- model</td>
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<td>- size</td>
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<td>- style</td>
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<tr>
<td>- grade</td>
<td></td>
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<tr>
<td>- freshness</td>
<td></td>
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<tr>
<td>- damages</td>
<td></td>
</tr>
<tr>
<td>ACTIVITY</td>
<td>RATING *</td>
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<tr>
<td>-------------------------------------------------------------------------</td>
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<tr>
<td>11. Noted any discrepancies?</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>12. Signed or initialed appropriate documents?</td>
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<tr>
<td>13. Routed/moved merchandise and documents to marking department?</td>
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<td></td>
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<tr>
<td>14. Disposed of waste?</td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:


PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1979.

RECEIVING, CHECKING AND MARKING. Kelly Ritch. Distributive Education Instructional Materials Laboratory, University of Texas at Austin, 1969.


VTECS

Warehouse Worker 28/42 Check invoice against purchase order

Warehouse Worker 45/60 Open containers with proper tools

Warehouse Worker 34/48 Check for colors of goods against invoice

Warehouse Worker 35/49 Check freshness of goods against invoice

Warehouse Worker 36/50 Check grades of goods against invoices

Warehouse Worker 37/51 Check models of goods against invoices

Warehouse Worker 38/52 Check quality of goods against invoices

Warehouse Worker 39/53 Check sizes of goods against invoices

Warehouse Worker 40/54 Check quantity of goods received against invoice

Warehouse Worker 41/55 Check styles of goods against invoice

Fashion Salesperson 15/28 Check in incoming merchandise

Retail Flowershop Salesperson 2/11 Check in incoming merchandise

IDECC

702/04 Route merchandise to selling department or reserve stockroom

708/05 Check in merchandise against the invoice

638/05 Know procedures for checking in merchandise against invoice

413/Mdse 25 Know reasons for returning merchandise to manufacturer
RETAILING I

TASK: Record And Handle Damaged And Broken Merchandise

PERFORMANCE OBJECTIVE: Given damaged goods, and appropriate forms, list all damaged goods on form and forward report to appropriate department. Performance will be rated acceptable when all items have been accounted for and all shortages and/or visible damages have been noted and reported to appropriate department. The count must be without error, with legible writing.

PERFORMANCE GUIDE:

1. Identify damaged goods.
2. Fill out damaged merchandise report:
   a. date
   b. stock number
   c. article description
   d. size
   e. quantity
   f. old price
   g. new price
   h. amount
   i. what is wrong with the article
   j. authorization
3. Notify proper departments, if applicable.
4. Mark goods so that others will see the possible hazard.
5. Properly store all damaged goods until authorizations are received for proper disposal or repair, if applicable.
6. Re-tag damaged item and return it to the selling floor, if applicable.
References/Resources:

VTEC3 Warehouse Worker 47/62  Record broken, short and damaged goods

IDECC 634/011  Know procedures for reporting and recording damaged merchandise
RETAILING I

TASK: Prepare Overage, Shortage And Discrepancy (OS&D) Report

PERFORMANCE OBJECTIVE: Given an invoice, bill of lading or freight bill and a description and count of items received, prepare an overage, shortage or discrepancy (OS&D) report. Any overages, shortages and damages must be noted, the packing slip must be signed and dated, and the proper forms must be (1) legible, (2) completely filled out without error, and (3) mathematically correct.

PERFORMANCE GUIDE:

1. Obtain invoice, invoice apron/packing slip and/or bill of lading, freight bill.
2. Check documents for noted discrepancies.
3. If there are overages, shortages, and/or discrepancies, complete OS&D report form accurately.
4. Sign and date OS&D Report and receiving documents.
5. Notify carrier regarding overages, shortages, and/or discrepancies.
References/Resources:

VTECS  Warehouse Worker 30/44  Prepare Overage, Shortage and Discrepancy (OS&D) Report

IDECC  639/07  Know how to handle incorrect amounts and/or types of merchandise

707/07  Handle incorrect amounts and/or types of merchandise
RETAILING I

TASK: Follow-Up Non-Delivered Or Lost Merchandise

PERFORMANCE OBJECTIVE: Given an invoice and/or purchase order and follow-up non-delivered or lost merchandise. All appropriate people must be notified and all forms must be correctly prepared and sent.

PERFORMANCE GUIDE:

1. Report problem to manager/supervisor.
2. Notify carrier and/or vendor.
3. Prepare and send tracer request form.
4. File claim, if necessary.
TASK: File Claims On Carriers Or Vendors For Damages, Shortages, Misrouting, Improper Packaging, Substitutions, Lost Merchandise, Overages And/Or Back Orders

PERFORMANCE OBJECTIVE: Given an OS&D Report and receiving report, list damages, shortages or lost merchandise, file a claim with carriers or vendors. All applicable information must be included on the claim form and all appropriate people notified of the claim.

PERFORMANCE GUIDE:

1. Obtain the receiving report and/or OS&D report. (Invoice and/or purchase order, if applicable)
2. Report problem to supervisor/manager.
3. Notify local freight office and/or warehouse.
4. Have agent inspect damages.
5. Prepare and send copies of the following forms:
   a. Claim form
   b. Bill of lading and waybill
   c. Freight bill
   d. Invoice/invoice apron and packing list
   e. Repair bill, if damage is repaired
   f. Carrier inspection report
   g. List of all items included in the claim
   h. Copies of all correspondence about the claim
References/Resources:

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1979.


IDECC 642/06 Know the procedures for filing claims on carriers and manufacturers

IDECC 703/06 Determine receiving discrepancies and take proper action
TASK: Report Shipments Received To Appropriate Department

PERFORMANCE OBJECTIVE: Given invoice/packing list, purchase order, or receiving record, prepare and distribute copies of the distribution report. The distribution report must be without error with legible writing, and sent to the appropriate department.

PERFORMANCE GUIDE:

1. Using the invoice/packing list, purchase order or the receiving record, prepare the distribution report.
2. Determine departments to receive copy of the distribution report.
3. Send appropriate copy of the distribution report to pre-determined department.

VTECS  Warehouse Worker 48/63 Report shipments received to appropriate departments
DUTY AREA:
PERFORMING STORING ACTIVITIES
TASK: Maintain And Update Master Warehouse Location Plans

PERFORMANCE OBJECTIVE: Given a diagram of the warehouse, a master warehouse location plan, a list of goods to be issued and a list of incoming goods; record all merchandise leaving and location and coding for all incoming merchandise. All applicable items on the checklist must have an acceptable rating.

PERFORMANCE GUIDE:
1. Obtain diagram of the warehouse.
2. Designate locations and coding numbers for incoming goods according to master warehouse location plans.
3. Record location of incoming goods in the stock location directory.
4. Locate goods to be issued by referring to the warehouse location plan.
5. Identify goods to be issued by referring to the warehouse location plan.
6. Revise master location plan to reflect merchandise leaving the warehouse or to reflect changes in location of merchandise.
<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Incoming goods given correct coding number?</td>
<td></td>
</tr>
<tr>
<td>2. Noted location of incoming goods in stock location directory?</td>
<td></td>
</tr>
<tr>
<td>3. Merchandise correctly stored (first in) first out like merchandise?</td>
<td></td>
</tr>
<tr>
<td>4. Located goods to be issued?</td>
<td></td>
</tr>
<tr>
<td>5. Goods issued according to first in, first out method?</td>
<td></td>
</tr>
<tr>
<td>6. Revised master warehouse location plan to reflect changes?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:

VTECS Warehouse \text{\textbf{ker 43/57}}: Maintain and update warehouse location plans
TASK: Maintain And Update Stock Location Directory

PERFORMANCE OBJECTIVE: Given stock location directory, a list of goods received, and a list of goods issue, maintain the stock location directory. Update directory daily and provide the following information: quantities on hand, quantities on order, quantities on back order.

PERFORMANCE GUIDE:

1. Obtain stock location directory, list of goods received, list of goods issued, list of goods on order.
2. Designate/record location, coding number, date and quantity of goods received.
3. Record date and quantity of goods issued.
4. Revise stock location directory when relocation occurs.
5. Periodically spot check to insure directory is correctly marked with correct locations.
6. Update location directory at the time of physical inventory.
References/Resources:

VTECS  Warehouse Worker 42/56  Maintain records for control of stored goods

Warehouse Worker 57/72  Make entries on the stock locator system cards to show changes in location of goods
RETAILING I

TASK: Carry-Out Safety Procedures For Stacking/Piling Goods

PERFORMANCE OBJECTIVE: Provided merchandise, safely stack/pile merchandise. All items on the instructor's checklist must be performed without error.

PERFORMANCE GUIDE:

1. Build pile up neatly and firmly.
2. Place torn or broken containers on top of the pile.
3. Stack round objects (drums or barrels) on end and lay a plank on top of each row before placing others above them.
4. An object that must be raised shoulder height or higher should first be to the waist. Rest the object and then bend your knees for spring as you lift.
5. Pile/stack bags with the mouth of the bag on the inside of the pile/stack. Keep the pile/stack less than five feet high.

*Note: 1. Slide object into place if it must fit tightly in a stack.
2. Test ladders for security and firmness before climbing.
<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Built firm, neat pile?</td>
<td></td>
</tr>
<tr>
<td>2. Placed torn or broken cartons on top?</td>
<td></td>
</tr>
<tr>
<td>3. Stacked round objects on end, using planks to secure the next layer?</td>
<td></td>
</tr>
<tr>
<td>4. Safely lifted objects?</td>
<td></td>
</tr>
<tr>
<td>5. Piled bags mouths on the inside?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:


RETAILING I

TASK: Palletize A Unit Load

PERFORMANCE OBJECTIVE: Provided merchandise, pallets and straps, palletize the merchandise. All applicable items on the instructor’s checklist must be completed safely.

PERFORMANCE GUIDE:

1. Choose the type pallet to be used according to size, weight, type, etc. of load.
2. Arrange load on pallet never letting any of the goods extend over the edge of the pallet.
   - Block pattern arrangement for items of equal length and width.
   - Brick, row and pinwheel arrangement for items of unequal length or width.
   - Place inner layer first, working out to pallet edges.
   - Distribute unused space evenly when stacking containers that do not completely cover the pallet surface.
   - Crosstie containers (alternate the direction of the containers) to help stabilize the load.
   - Position carton edges as vertical support for additional tiers. (Most cartons have four edges which are reinforced)
3. Strap the load, if necessary.
   - Over-the-load straps for fastening the load up and down
   - Horizontal straps for fastening the load sideways or around
   - Both type; fasten horizontal straps first
**INSTRUCTOR CHECKLIST:** Palletize A Unit Load

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Pallet was selected according to size, weight and type of load?</td>
<td>Acceptable</td>
</tr>
<tr>
<td>2. The load was safely arranged on the pallet?</td>
<td></td>
</tr>
<tr>
<td>3. The load was strapped securely?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:

WAREHOUSING. Melvin Hatchett. Instructional Materials Services, University of Texas at Austin, 1974.

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980

TASK: Move Goods To Storage Area

PERFORMANCE OBJECTIVE: Provided goods to be stored and materials handling equipment, move the goods to the storage area. The goods must be moved to the correct location without damage, while avoiding personal injury to mover or fellow workers.

PERFORMANCE GUIDE:

1. Identify proper storage areas using the stock location directory.
2. Choose the best way to move the goods:
   - Determine approximate weight and size of the load
   - Determine materials handling equipment to be used
     - Pallets
     - Containers
     - Dollie/Upright hand truck (two-wheeled hand truck)
     - Platform hand truck (four-wheeled hand truck)/hampers
     - Forklift
     - Conveyor
3. Stack the load evenly. Do not stack the load too high. Do not overload.
4. Balance the load.
5. Check the way ahead.
6. Move the load at a safe speed.
References/Resources:


VTECS Warehouse Worker 44/59 Move goods to proper stocking area
RETAILING I

TASK: Store Merchandise And Supplies

PERFORMANCE OBJECTIVE: Given merchandise to be stored, materials handling equipment, and packing slip/invoice; store goods. Performance will be rated acceptable if no parts are damaged while handling, each item is arranged in the correct location, and the stored goods do not present a safety hazard.

PERFORMANCE GUIDE:

1. Identify storage area using the Master Warehouse Location Plan.
2. Determine if location is suitable.
3. If appropriate space is not available, relocate and record location.
4. Move goods to storage area.
5. Arrange stock according to identification code and like items.
7. Update bin ticket, if necessary.
8. Return all documents to appropriate store employee.
References/Resources:


VTECS Warehouse Worker 49/64 Store goods in proper location

IDECC 648/010 Know types of merchandise storage (Master Warehouse Plan

615/02 Know storage safety procedures
RETAILING I

TASK: Store Items Classified As Sensitive, Hazardous, And/Or Flammable

PERFORMANCE OBJECTIVE: Given goods which are classified as sensitive, hazardous or flammable, provide secure storage. Goods must be stored according to OSHA recommendations and/or store policies.

PERFORMANCE GUIDE:

1. Determine type of classified goods to be stored.
2. Establish secure area as recommended by OSHA.
3. Mark/identify goods and storage area.
4. Check cartons for damage or leakage.
5. Wear gloves and faceshield.
6. Balance loads and move them at a safe speed.

*Note:

Hazardous goods have the following characteristics:
1. Low-ignition temperature
2. Corrosive
3. Poison contamination
4. Susceptible to spontaneous combustion
5. Decomposition
6. Should be isolated from other hazardous goods

Flammable materials:
1. Store in well ventilated area
2. Admittance to storage area should be restricted to authorized personnel only
3. Isolate flammable goods

Acids:
1. Inspect for leaks, breaks, and any other damage to container
2. Use rubber gloves when handling
3. Keep acids away from water
4. Isolate acids
5. Glass storage containers recommended

Some chemicals are extremely corrosive or combustible when mixed together or if moisture is present.
WAREHOUSING. Melvin Hatchett. Instructional Materials Services, University of Texas at Austin, 1974.

VTECS Warehouse Worker 46/61 Provide secure storage for goods which are classified as sensitive, hazardous, flammable
DUTY AREA:
PERFORMING INVENTORYING ACTIVITIES
RETAILING I

TASK: Prepare Stock For Inventory

PERFORMANCE OBJECTIVE: Given merchandise in storage or on the selling floor, prepare the stock for inventory. All applicable items on the instructor's checklist must be completed.

PERFORMANCE GUIDE:

1. Arrange merchandise so it can be counted.
2. Update bin tickets.
3. Open partially filled containers, mark number of units on the outside and seal the container.
4. Gather all loose, single articles and stack or sort them for ease in counting.
5. Physically inspect merchandise and note old or damaged merchandise.
## Instructor Checklist: Prepare Stock For Inventory

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> Arranged merchandise to be counted?</td>
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<tr>
<td><strong>2.</strong> Updated bin tickets?</td>
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<tr>
<td><strong>3.</strong> Opened and counted contents of partially filled containers?</td>
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<td><strong>4.</strong> Marked number of units on the outside and resealed partially filled containers?</td>
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<td><strong>5.</strong> Gathered, stacked and/or sorted loose stock?</td>
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<td><strong>6.</strong> Inspected merchandise and noted any problems?</td>
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<td></td>
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</tbody>
</table>
References/Resources:

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1969.

VTECS Fashion Salesperson 21/35 Take inventory
RETAILING I

TASK: Take Inventory

PERFORMANCE OBJECTIVE: Provided an inventory recording form, a calculator (optional), and designated merchandise to inventory, inventory the merchandise. All merchandise must be counted, mathematical computations must be correct and all entries must be legible.

PERFORMANCE GUIDE:

1. Prepare or obtain a master inventory list of items stocked showing:
   a. Name (Description of merchandise) and stock number
   b. Unit price
   c. Diagram of merchandise area

2. Conduct count:
   a. Count each item of merchandise and enter the count in the appropriate space on the master inventory list.
   b. Count loose and sorted items; write count on master list.
   c. For sealed boxes, write the count that is printed on the box.
   d. Refer to master inventory list to determine that all items of merchandise have been counted.

3. Extend inventory sheets: (optional)
   a. Multiply quantity times unit price.
   b. Calculate total cost per item of merchandise and enter on master inventory list.
References/Resources:

VTECS  Fashion Salesperson 21/35  Take inventory
    Hardware Salesperson 24/37  Take inventory
    Warehouse Worker 53/68  Conduct on-going physical inventory
                      54/69  Conduct periodic physical inventory

IDECC  463/Mdse 26  Take physical inventory
    442/Mdse 28  Count stock for inventory
    414/Mdse 27  Know how to take a stock count for physical inventory
    466/Mdse 4  Prepare inventory control records and forms
    400/Mdse 3  Know the uses of inventory control forms and records
    401/Mdse 27  Know the purpose of stock counts
    470/05  Inventory forms
RETAINING I

TASK: Adjust Inventory Records

PERFORMANCE OBJECTIVE: Given a set of current inventory records (stock control records) and packing list/purchase orders; update and adjust inventory records on a regular basis for incoming and outgoing goods. Posting must be done daily, without error, and provide the following information: quantities on hand, on order, on backorder, and sold in any given period. Any stock irregularities must be corrected or reported to the appropriate personnel.

PERFORMANCE GUIDE:

1. Obtain list of all incoming goods.
2. Establish physical inventory schedule.
3. Re-inventory goods showing discrepancies.
4. Verify or adjust discrepancies (overages or shortages).
5. Prepare necessary input data for computer or hand adjustments to inventory records.
6. Update inventory records on a regular basis.
References/Resources:

VTECS Warehouse Worker 50/65

1DECC 466/Mdse 4 Prepare inventory control forms and records
400/Mdse 3 Know how to prepare inventory control forms and records
RETAILING I

TASK: Maintain And Update Stock Record Cards

PERFORMANCE OBJECTIVE: Given location directory, list of items ordered, list of merchandise received and issued maintain and update stock record cards.

PERFORMANCE GUIDE:

1. Obtain location directory, list of items on order, list of merchandise received, list of merchandise issued and stock record cards.

2. Record date and number of items received. Add number of items on hand and number of items received for new total of items on hand. (Formula A: number of items on hand + number of items received = new total items on hand)

3. Record date and number of items issued. Subtract number of items issued from number of items on hand. (Formula B: number of items on hand - number of items issued = new total items on hand)

4. Determine if re-order is necessary. (If Formula B is less than Formula A re-order is necessary)

5. Update stock record cards according to list of items ordered. Record the number of the order, date of the order and amount ordered.

6. Prepare stock record card for new merchandise by recording:
   - Supplier name
   - Name of Item
   - Stock Number
   - Storage Area Location
   - Minimum, maximum and re-order point for the item
   - Date, number of items received, and total on hand

7. File or re-file cards.
References/Resources:

PHYSICAL DISTRIBUTION: RECEIVING, SHIPPING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1969.

VTCES Warehouse Worker 60/75 Post transaction data to stock control record cards

Warehouse Worker 56/71 File stock record cards

IDECC 640/010 Stockkeeping forms and reports

427/05 Unit inventory control systems (stock card records)
RETAILING I

TASK: Audit Stock Balance And Consumption Reports

PERFORMANCE OBJECTIVE: Given stock record cards, receipt and consumption reports, compare figures on cards against reports and correct any discrepancies found. All corrections must be without error, written legibly, and mathematically correct.

PERFORMANCE GUIDE:

1. Obtain reports.
2. Compare posted figures on stock record cards to receipt and consumption reports.
3. Identify discrepancies, write amended reports and reconcile with original report.
References/Resources:

VTECS Warehouse Worker 51/66 Audit stock balance and consumption reports
DUTY AREA:
PERFORMING SHIPPING ACTIVITIES
RETAILING I

TASK: Prepare Goods For Return To Manufacturer

PERFORMANCE OBJECTIVE: Provided merchandise, address label, packing filler, vendor address, charge-back forms/memorandum invoice, container, wrapping materials, shipping forms and scales, prepare merchandise for return to vendor. The merchandise must be packed to insure safe arrival; it must be securely wrapped and labeling must indicate complete address of sender, receiver and method of shipment.

PERFORMANCE GUIDE:

1. Prepare merchandise return forms. (Charge-back forms or memorandum invoice).
2. Count goods.
3. Remove all store tags.
4. Pack and wrap merchandise for return to vendor:
   a. Choose a container, packing and wrapping material according to size and type merchandise to be returned.
   b. Pack container with merchandise to be returned and a copy of the charge-back form or memorandum invoice.
      - Cushion the merchandise with packing material on the bottom of box to absorb vibration using one or more of the following: shredded newspaper, styrofoam packing, confetti.
      - Wrap each item of merchandise, if necessary.
      - Place wrapped items of merchandise in the center of the carton and place packing material around and over them.
   c. Seal the package.
   d. Wrap the package, if necessary.
      1. position parcel on heavy wrapping paper
      2. wrap lengthwise
      3. tuck ends and make neat folds at corners
      4. secure with tape
5. Label/address container with vendor's and sender's name and address.
7. Affix postage, if necessary.
8. Prepare shipping forms (bill of lading, return authorization document, etc.), if necessary.
9. Select shipping route and carrier and label package accordingly.
10. Calculate transportation charge.
11. Mail a separate copy of all forms to vendor.
References/Resources:

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1979.


VTECS Fashion Salesperson 7/15 Pack and wrap merchandise for return to vendor

Warehouse Worker 25/39 Prepare damaged goods and claims for reshipment

Warehouse Worker 18/31 Address Packages/Cartons/Containers

Warehouse Worker 19/32 Affix Postage, if necessary

Warehouse Worker 59/74 Prepare Shipment Documents

IDECC 700/07 Pack or wrap merchandise for return to vendor

366/Math 28 Determine transportation charges

378/Math 28 Know shipping terminology

359/Math 7 Compute postal and mail charges

VTECS Warehouse Worker 22/35 Determine method of shipment
RETAILING I

TASK: Transfer Stock To Branch Stores

PERFORMANCE OBJECTIVE: Provided a transfer form, a request for transfer, and merchandise, transfer the stock. All required information (quantity, style, etc.) must be on the transfer form; stock must be as requested, prepared for transfer and delivered to designated area.

PERFORMANCE GUIDE:

1. Complete the transfer form for the merchandise that is to be transferred to another store:
   a. Date the form.
   b. Indicate where the merchandise is to be transferred.
   c. Record style and class number on the form.
   d. Write a description of the merchandise.
   e. Record the retail price of each piece of the merchandise and the total dollar amount.
   f. Record the number of items being transferred.
   g. Indicate the reason for transferring the merchandise, if necessary.
   h. Sign the transfer form.
   i. Have the transfer authorized.
   j. Adjust store inventory records.
2. Prepare the merchandise for transfer.
3. Take or request that the merchandise be taken to the shipping department for transfer.
4. Send paperwork to appropriate store employee.

*Note: Precautions that might be taken to avoid damage to merchandise being transferred to branch stores include:

   - Proper choice of boxes or wrapping.
   - Boxes must be carefully closed.
   - Items correctly wrapped.
   - Contents designated on the package.
   - Perishable goods properly marked.
   - Place fragile and crushable items on top.
   - Follow directions on boxes (this end up).
   - Load so that there will be a minimum of shifting during transit.
PERFORMANCE GUIDE (Cont.):

Use tools carefully.
Follow storage instructions (keep from freezing).
Don't throw cartons around.
Get help when moving heavy loads.
Don't let boxes build up on the loading docks.
Protect from rain or other water damage.
References/Resources:

VTECS  Fashion Salesperson 22/36  Transfer stock to branch stores
IDECC  698/08  Transfer stock
        445/Mdse 3  Record transfer of stock
        403/Mdse 30  Know procedures for recording transfer of stock
DUTY AREA:
PERFORMING STOCKING ACTIVITIES
TASK: Obtain Goods From Stockroom Or Warehouse

PERFORMANCE OBJECTIVE: Given a list of merchandise needed, pull merchandise and move to proper department. The merchandise must be moved to the correct location without damage, while avoiding personal injury to the mover and fellow workers.

PERFORMANCE GUIDE:

1. Obtain and analyze the request for merchandise.
2. Determine location of goods.
3. Secure necessary materials handling equipment.
4. Pull merchandise and move to the proper department.
5. Choose equipment according to weight and size of goods to be moved.
6. Balance the load.
7. Get help if needed.
8. Plan your move.

*Note: The following safety factors must be followed:
   a. Properly store materials handling materials when not in use.
   b. When moving any merchandise, watch for oily and grease spots, and be careful when going around corners.
   c. Use equipment for the purpose it has been designed.
   d. Do not overload.
   e. Do not leave goods or equipment in corridors.
   f. Wear gloves if moving sharp objects.
References/Resources:

VTECS  Warehouse Worker 24/38  Obtain goods from stockroom or warehouse
TASK: Deliver Goods To Proper Department

PERFORMANCE OBJECTIVE: Given requisition orders, goods to be delivered, materials handling equipment, and location transfer forms, identify and deliver the merchandise to the requested location. When delivery has been completed there must be no damage to the merchandise, it must be delivered to the correct location and there must be no injury to the materials handler or fellow workers.

PERFORMANCE GUIDE:

1. Identify goods to be delivered.
2. Locate goods.
3. Identify destination of goods.
4. Pull merchandise.
5. Wear gloves if handling sharp or slippery materials.
6. Choose proper handling equipment according to size and weight of goods to be moved.
7. Do not overload/balance the load.
8. Move goods at a safe speed.
9. Return handling equipment to proper area.
10. Deliver goods to assigned location.
11. Complete location/transfer reports.
VTECS  Warehouse Worker 55/70  Deliver goods to proper location
RETAILING I

TASK: Check In Merchandise Received From Stockroom

PERFORMANCE OBJECTIVE: Provided an order of merchandise, an invoice and a copy of the order sheet, check in the order. When finished, the actual count of merchandise must be recorded next to each item on the invoice and the order sheet, a note of any damages or discrepancies must be recorded on the invoice and the order sheet, and the retail price of each item must be verified and corrected if necessary.

PERFORMANCE GUIDE:

1. Read the invoice to determine:
   a. Quantity of merchandise requested
   b. Sizes requested
   c. Styles requested
   d. Color requested

2. Check all merchandise received:
   a. Count the number of each item of merchandise received and write the actual count beside the count that appears on the invoice and the order sheet.
   b. If premarked, check price tag to determine that correct price is recorded on the tag.
   c. Check the condition of the merchandise.
   d. Write a description of any damages on the invoice and the order sheet and return the item to the stockroom. (Attach a note of damages to item of merchandise, if applicable.)
   e. Record any other discrepancies on the invoice and the order sheet.
   f. Initial invoice and order sheet and route them to appropriate store employee.
References/Resources:

VTECS Fashion Salesperson 1/8  Check count of merchandise received from stockroom.

IDECC 708/05  
638/05  Check in merchandise against the invoice

701/04  Know procedures for checking in merchandise against the invoice

641/35  Determine shipping and receiving discrepancies

647/05  Know receiving bookkeeping procedures

647/05  Know receiving terminology.

VTECS Fashion Salesperson 2/9  Check merchandise and retail price against copy of the order sheet
RETAILING I

TASK: Price Mark Merchandise

PERFORMANCE OBJECTIVE: Provided merchandise price tickets, a price-marking machine (marking tools), price ticket fasteners, and retail price list, price mark each item of merchandise. Each price ticket must be marked clearly with the correct price and store information and fastened securely to the merchandise.

PERFORMANCE GUIDE:

1. Choose price tickets suitable for merchandise to be marked.
2. Gather merchandise, price tickets and fasteners.
3. Obtain retail price list and any other information to be printed on the price ticket. (Cost-price code, season/date code, style number, size, color, fiber content, department code, manufacturer's code number) (Calculate markup if necessary)
4. Count merchandise to determine how many price tickets to print.
5. Operate price marking machine. (optional)
6. Hand-print price tickets. (optional)
7. Attach price tickets to merchandise.
8. Attach shoplifting detection wafer. (optional)
9. Inspect prices on merchandise for accuracy, count merchandise and compare the count to the number that appears on the purchase order or invoice.
10. Route/move merchandise to the selling floor or reserve stock area.
11. Return the invoice or purchase order to the appropriate store employee.
References/Resources:


VTECS Fashion Salesperson 13/25 Affix prices on merchandise

IDECC 396/Mdse 38 Know pricing policies and price line structure

  710/09 Operate price marking equipment
  644/09 Know how to operate price marking equipment
  709/09 Attach price tickets to merchandise
  645/09 Know how to put price tickets on merchandise
  641/05 Know price marking bookkeeping procedures
  647/05 Know price marking terminology
  364/Math 27 Calculate markup

  428/Mdse 5 Know the uses of tickets stubs and forms to keep records of merchandise sold by classification
RETAILING I

TASK: Shelve Merchandise

PERFORMANCE OBJECTIVE: Provided merchandise, a price list, display props/fixtures, stocking tools and supplies, stock the merchandise. When finished, all of the merchandise must be price marked, visible to customers, in related groups and displayed according to kind, color, and size.

PERFORMANCE GUIDE:

1. Assemble tools and supplies:
   a. Box cutter/or other appropriate opening tools.
   b. Price tags
   c. Price markers
   d. Price list
   e. Dust cloth/feather duster
2. Avoid placing boxes, tools and supplies in customer traffic area.
3. Open boxed merchandise with appropriate tool.
4. If necessary, clean/dust the merchandise.
5. Price-mark each item of merchandise before placing it on fixture/prop. If merchandise is pre-priced check the price ticket against the price list for accuracy. Check for price agreement with previously stocked items.
6. Check shelf allocation, if applicable.
7. Clean fixture/prop, if necessary.
8. Rotate stock.
9. Stock like merchandise according to color, size and kind.
10. When stocking shelves and counters, place merchandise so that it is secure and will not fall.
11. Stock easily pilfered items in lockable props/fixtures.
12. Clean up and dispose of all packing material.
13. Return tools to storage area.
References/Resources:

**VTECS** Fashion Salesperson 12/24 Stock merchandise

Hardware Salesperson 23/36 Stock shelves

**IDECC** 838/S24 Know how to stock merchandise

504/PS19 Know how to stock merchandise

615/02 Know stocking safety procedures

840/S23 Know housekeeping duties performed for stock care

908/S25 Rotate Stock

878/S26 Locate and refill Low Stock items

881/S27 Locate and arrange reserve stock (replenish floor stock from reserve stock)

**VTECS** Cashier Checker 36/105 Stock merchandise on racks and shelves
RETAILING I

TASK: Count Stock To Be Advertised

PERFORMANCE OBJECTIVE: Given a request for a stock count of merchandise to be advertised, locate and count the merchandise. The count must be accurate and the information returned to the requesting store department.

PERFORMANCE GUIDE:

1. Obtain a list of merchandise to be advertised.
2. Identify/locate merchandise to be advertised.
3. Prepare for count of designated merchandise:
   a. Arrange merchandise so it can be counted.
   b. Open partially filled containers, count the contents, mark the number on the outside and seal the container.
   c. Gather all loose, single items and stack or sort for ease in counting.
   d. Inspect merchandise and note any damages or signs of age.
4. Conduct count:
   a. Count each item of merchandise and record count.
   b. Count loose and sorted items and record count.
   c. For sealed boxes, write the count that is printed on the box.
   d. Refer to the list of merchandise to determine that all merchandise has been counted.
5. Forward merchandise count to supervisor.
References/Resources:

VTECS  Fashion Salesperson 21/35
IDECC  014/Adv 2  Count stock to be advertised
RETAINING I

TASK: Change Prices On Merchandise

PERFORMANCE OBJECTIVE: Provided price marking tools and supplies, a price change list and merchandise, change the prices on the merchandise. When completed, each item of merchandise on the price change list must be correctly and legibly price marked.

PERFORMANCE GUIDE:

1. Assemble price marking tools, supplies and price list:
   - price change list
   - price tickets
   - fasteners
   - price marking machine
   - price re-marking machine
   - pens or markers

2. Determine type of re-marking. (new ticket, clip old price and show new price, show both old and new price)

3. If mark-down is indicated by price change list, slash through the original price with a pen and write the indicated new price or operate the price re-marking machine.

4. If mark-up is indicated by the price change list, count the number of items and make new price tags with indicated new prices.

5. Remove old price tags from merchandise, if necessary.

6. Attach new price tickets, if necessary.

7. Inspect prices for accuracy.

8. Record price changes in the price books (optional).

*Note: Price mark-up should be done in storage area.
References/Resources:


**VTECS**
- **Fashion Salesperson 14/27** Change prices on merchandise
- **Hardware Salesperson 4/16** Record merchandise price changes in price books

**IDECC**
- **444/Mdse 40** Change prices on merchandise
- **406/Mdse 40** Know methods/procedures for changing prices up or down
- **426/Mdse 40** Know the procedures for recording price changes
DUTY AREA:
PERFORMING DISPLAYING ACTIVITIES
TASK: Design Point-Of-Purchase Signs

PERFORMANCE OBJECTIVE: Provided merchandise and a point-of-purchase sign request form, design a sign for the merchandise. The plan for the sign should include information that will benefit customers and a message that is brief, factual and will attract the customer's attention.

PERFORMANCE GUIDE:
1. Analyze the merchandise. Determine what customer benefits it offers:
   - Pleasure
   - Comfort
   - Protection
   - Time or labor savings
   - Money savings
   - Appearance improvements
   - Pride of ownership
   - Security
2. Write the name of the product.
3. Write a list of the selling features of the product:
   a. Materials of which it is made
   b. How is it made
   c. How it is superior
   d. How can it be used
   e. Its care features
   f. Its new uses
4. Write the price of the product.
5. Give the point-of-purchase sign request form to the print shop.
References/Resources:

VTECS  Fashion Salesperson 3/10  Design point-of-purchase signs

IDECC  227/031  Design and letter signs
       181/017  Know how to design and letter signs
       217/029  Develop display signs
       195/029  Know how to develop display signs

Display and Promotion, 2nd edition. Occupational Manuals and Projects in
RETAILING I

TASK: Letter Signs

PERFORMANCE OBJECTIVE: Given a display and access to show card lettering tools and supplies, letter a show card for the display. The show card must be sized and color coordinated appropriately for the display. It must incorporate the principles of artistic design, must be informative and readable and placed on the display in a location where it promotes customer interest.

PERFORMANCE GUIDE:

1. Write a plan for the show card including the following:
   a. The selling features of the item and service
   b. The size and color of the card that is to be used
   c. The style of lettering that is to be used
   d. The copy that is to be lettered on the show card
2. Assemble the tools and materials that will be needed for lettering the show cards at the work area:
   a. Lettering ink or paint
   b. Ruler and square
   c. Show card stock
   d. Lettering pens or brushes
   e. Pencils.
3. Determine the size of show cards that is needed.
4. Line off the show card stock with a hard lead pencil.
5. Lay out the show card in a size proportionate to the display and incorporate the following principles of design:
   a. Balance
   b. Unity
   c. Harmony
   d. Scale and proportion
6. Letter the card:
   a. Select style of lettering that will be easy for customers to read and is an appropriate contrast to background material.
   b. Write a copy that is factual, direct and to the point.
   c. Avoid including unnecessary words and distracting material.
   d. Select lettering colors that will contrast with the card stock.
   e. Letter the cards. Avoid ink or paint smears, fingerprints, cuts and tears.
7. Display the show card in a location on the display where it will promote customer interest in the merchandise or service.
References/Resources:

VTECS Fashion Salesperson 6/13 Letter Signs

Flowershop Salesperson 8/19 Design and letter show cards

IDECC 227/D31 Design and letter signs

181/D17 Know how to design and letter signs

RETAILING I

TASK: Set Up Manufacturer's Displays

PERFORMANCE OBJECTIVE: Given a manufacturer's display and access to tools and display space, set up the display. The finished display must compare with the manufacturer's illustration, all items of merchandise must be price marked, and the display must be set up so that it will not fall under the weight of the merchandise.

PERFORMANCE GUIDE:

1. Read the manufacturer's instructions for setting up the display.
2. Assemble the necessary tools.
3. Construct the display prop according to manufacturer's instructions at the work area.
4. Move the prop to the display area.
5. Inspect and assemble the merchandise to be put on display prop.
6. Assemble price-marking tools and supplies.
7. Clean prop and merchandise.
8. Price-mark merchandise as it is placed on prop.
9. Dispose of debris.
References/Resources:

**VTECS**  
Fashion Salesperson 9/19  
Set up manufacturers' display

Retail Flowershop Salesperson 13/39  
Set up manufacturers' display

**IDECC**  
221/D26  
Use manufacturers' display aids

188/D13  
Know how to use manufacturers' display aids

RETAILING I

Task: Set Up Counter Displays

PERFORMANCE OBJECTIVE: Provided merchandise, display space, display tools and equipment, set up a counter display. The finished display must meet all applicable criteria on the instructor's checklist.

PERFORMANCE GUIDE:

1. Write a plan for the display including:
   a. The theme or purpose
   b. Merchandise to be used
   c. Display accessories to be used
   d. Show/price cards to be used
   e. Tools and supplies to be used
2. Draw a sketch of how the display will appear when finished.
3. Letter or order printed show and price cards.
4. Assemble tools, merchandise, props, and accessories at the work area.
5. Set up the display incorporating the following principles of display:
   a. Balance
   b. Harmony
   c. Color and texture
   d. Scale and proportion
   e. Shape
   f. Focal area
   g. Repetition
   h. Unity
6. Incorporate the following safety standards in the display:
   a. Use props that will safely support all displayed merchandise.
   b. Place all merchandise so that no hazards exist.
   c. Place all electrical and lighting fixtures so that all safety requirements are met.
   d. Use only fire-resistant accessory materials in the display.
   e. Avoid placing display in an area that will block exits or entrances.
   f. Avoid having any sharp edges and corners in the display.
PERFORMANCE GUIDE (Cont.):

7. Set up a display which:
   a. Avoids the use of lighting or other display techniques that will present a false impression of the merchandise.
   b. Has only fresh and clean merchandise, props and accessories.
   c. Has a definite theme or purpose.
   d. Includes show and price cards that are informative, free of errors, dirt, smudges and that follow the purpose or theme of the display.

8. Dispose of all debris.
9. Return tools and materials to storage area.
### INSTRUCTOR CHECKLIST: Set Up Counter Displays

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>The display:</td>
<td></td>
</tr>
<tr>
<td>1. Attracted the attention of customers?</td>
<td></td>
</tr>
<tr>
<td>2. Exhibited the principles of display?</td>
<td></td>
</tr>
<tr>
<td>3. Exhibited the following safety standards:</td>
<td></td>
</tr>
<tr>
<td>a. Props were structurally designed to safely support displayed merchandise?</td>
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<tr>
<td>b. Placement of merchandise was arranged so that no safety hazards existed?</td>
<td></td>
</tr>
<tr>
<td>c. Lighting or other electrical fixtures were placed to meet all safety requirements?</td>
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<tr>
<td>d. Flammable materials used in display were fire resistant as far as possible?</td>
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<tr>
<td>e. Display was not located in an area where it would block exits or entrances?</td>
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<tr>
<td>f. Display was free of sharp edges and corners?</td>
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</tr>
<tr>
<td>4. Included clean and fresh merchandise?</td>
<td></td>
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<tr>
<td>5. Was designed around a definite theme or purpose?</td>
<td></td>
</tr>
<tr>
<td>6. Included showcards or price tags that were informative, free of errors, dirt, smudges, and followed the purpose or theme of the display?</td>
<td></td>
</tr>
<tr>
<td>7. Disposed of all debris?</td>
<td></td>
</tr>
<tr>
<td>8. Returned tools and materials?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:

**VTECS Fashion Salesperson 8/16** Set up counter display

Retail Flowershop Salesperson 9/23 Set up counter display

**IDECC 205/D32** Build counter display

- **230/D25** Use various types of display arrangements
- **190/D7** Know different types of display arrangements
- **178/D7** Know different types of display arrangements

**231/D26** Use various types of display fixtures

- **174/D13** Know types of display fixtures
- **228/D24** Use principles of color, harmony, balance and proportion
- **179/D10** Know how to use principles of color, balance and proportion
- **225/D30** Use price cards
- **180/D17** Know how to use price cards

**209/D32** Build displays of merchandise as it can be used

- **191/D7** Know how to build displays of merchandise as it can be used
- **203/D32** Know display building techniques
- **201/D32** Know how to use cartons, boxes and cases in building displays

**218/D28** Adjust display lighting

- **185/D16** Know how to adjust display lighting

**894/S29** Display merchandise

**805/S29** Know how to display merchandise

**176/D15** Prepare merchandise for display

RETAILING I

TASK: Dress Mannequins

PERFORMANCE OBJECTIVE: Provided a mannequin, clothing, accessories, tools and equipment, dress the mannequin. The mannequin must be dressed and accessorized appropriately without damaging any of its parts or the merchandise.

PERFORMANCE GUIDE:

1. Remove wig, or if wig cannot be removed, cover it with a plastic bag.
2. Unlock and remove detachable arms.
3. Disassemble torso from lower half of mannequin; remove the stand from lower half of body.
4. Turn lower half up-side down and put on hose.
5. Slip slacks over lower half of mannequin (if applicable).
6. Place shoes on feet and fasten.
7. Place lower half on support rod and fasten set screws.
8. Reattach torso of mannequin to lower half, taking care to avoid damage to slacks. Lock torso into position.
9. Place unbottoned sweater/blouse/shirt on torso.
10. Place unbottoned dress/coat on mannequin.
11. Slip arms up sleeve of garments and securely lock into position.
12. Button all garments beginning with the inner most item.
13. Select a complementary wig and/or scarf and put in place.
15. Check for loose threads, tickets or wrinkles which may detract from display.
References/Resources:

VTECS Fashion Salesperson 5/12 Dress mannequins

IDECC 217/D26 Dress mannequin

193/D13 Know how to dress mannequin

RETAILING I

TASK: Set Up Window Displays

PERFORMANCE OBJECTIVE: Given merchandise, window display space, tools and materials, set up a window display. The finished display must meet all applicable criteria on the instructor's checklist.

PERFORMANCE GUIDE:

1. Write a plan for the display including:
   a. The theme or purpose
   b. Merchandise to be used
   c. Display accessories to be used
   d. Show/price cards to be used
   e. Tools and supplies to be used

2. Draw a sketch of how the display will appear when finished.

3. Letter or order printed show/price cards.

4. Assembled tools, merchandise, props and accessories at the work area.

5. Set up the display incorporating the following principles of display:
   a. Balance
   b. Harmony
   c. Color and texture
   d. Scale and proportion
   e. Shape
   f. Focal area
   g. Repetition
   h. Unity

6. Incorporate the following safety standards when building the display:
   a. Keep in mind that you are surrounded by glass and avoid any moves that will cause it to break.
   b. Use props to safely support all displayed merchandise.
   c. Place all electrical and lighting fixtures so that all safety requirements are met.
   d. Use only fire-resistant accessory materials in the display.

7. Avoid the use of lighting or other display techniques that will present a false impression of the merchandise.

8. Set up the display to include show and price cards that are informative, free of errors, dirt, smudges, and that follow the purpose or theme of the display.
9. To set up the display:
   a. Clean the window display area including the glass and floor area.
   b. Assemble the merchandise, tools, props and accessories.
   c. Set up window display background.
   d. Set up the display props.
   e. Place merchandise on the display props and in the window display space.
   f. Set up accessory lighting fixtures.
   g. Set in show and price cards.
   h. Dispose of all debris.
   i. Return tools to work area.
# INSTRUCTOR CHECKLIST: Set Up Window Displays

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>The display:</td>
<td></td>
</tr>
<tr>
<td>1. Attracted the attention of customers?</td>
<td></td>
</tr>
<tr>
<td>2. Exhibited the following principles of display?</td>
<td></td>
</tr>
<tr>
<td>3. Exhibited the following safety standards:</td>
<td></td>
</tr>
<tr>
<td>a. Props were structurally designed to safely supported displayed</td>
<td></td>
</tr>
<tr>
<td>merchandise?</td>
<td></td>
</tr>
<tr>
<td>b. Placement of merchandise were arranged so that no safety hazards</td>
<td></td>
</tr>
<tr>
<td>existed?</td>
<td></td>
</tr>
<tr>
<td>c. Lighting or other electrical fixtures were placed to meet all safety</td>
<td></td>
</tr>
<tr>
<td>requirements?</td>
<td></td>
</tr>
<tr>
<td>d. Flammable materials used in display were fire resistant?</td>
<td></td>
</tr>
<tr>
<td>4. Did not include lighting or other display techniques that deliberately</td>
<td></td>
</tr>
<tr>
<td>presented a false impression of the merchandise?</td>
<td></td>
</tr>
<tr>
<td>5. Included merchandise in the display that was clean and fresh?</td>
<td></td>
</tr>
<tr>
<td>6. Was designed around a definite theme or purpose?</td>
<td></td>
</tr>
<tr>
<td>7. Included showcards or price tags that were informative, free of</td>
<td></td>
</tr>
<tr>
<td>errors, dirt, smudges, and followed the purpose or theme of the display?</td>
<td></td>
</tr>
<tr>
<td>8. Disposed debris?</td>
<td></td>
</tr>
<tr>
<td>9. Returned tools and materials?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:

VTECS  Fashion Salesperson 10/20  Set up window displays

IDECC  230/D25  Use various types of display arrangements

190/D7  Know how to use various types of display arrangements
178/D7  Know how to use various types of display arrangements
231/D26  Use various types of display fixtures
174/D13  Know types of display fixtures
228/D24  Use principles of color, harmony, balance and proportion
179/D10  Know how to use principles of color, harmony, balance and proportion
225/D30  Use price cards
180/D17  Know how to use price cards
209/D32  Build display of merchandise as it can be used
191/D7  Know how to build display of merchandise as it can be used
203/D32  Know display building techniques
201/D32  Know how to use carton, boxes and cases in building displays
218/D28  Adjust display lighting
185/D16  Know how to adjust display lighting
206/D32  Build window display
894/S29  Display merchandise
805/S29  Know how to display merchandise
224/D26  Construct display fixtures and backgrounds
215/D26  Construct display fixtures and backgrounds
226/D27  Construct display fixtures and backgrounds
183/D13  Know how to construct display fixtures
182/D14  Know how to construct display fixtures
176/D15  Prepare merchandise for display

RETAILING I

TASK: Set Up Mass Display

PERFORMANCE OBJECTIVE: Provided merchandise, display space, display tools and equipment, set up a mass display. The finished display must meet all applicable criteria on the instructor's checklist.

PERFORMANCE GUIDE:

1. Write a plan for the display including:
   a. The theme or purpose
   b. Merchandise to be used
   c. Display accessories to be used
   d. Show/price cards to be used
   e. Tools and supplies to be used

2. Draw a sketch of how the display will appear when finished.

3. Letter or order printed show and price cards.

4. Assemble tools, merchandise, props, and accessories at the work area.

5. Set up the display incorporating the following principles of display:
   a. Balance
   b. Harmony
   c. Color and texture
   d. Scale and proportion
   e. Shape
   f. Focal area
   g. Repetition
   h. Unity

6. Incorporate the following safety standards in the display:
   a. Use props that will safely support all displayed merchandise
   b. Place all merchandise so that no hazards exist.
   c. Place all electrical and lighting fixtures so that all safety requirements are met.
   d. Use only fire-resistant accessory materials in the display.
   e. Avoid placing display in an area that will block exits or entrances
   f. Avoid having any sharp edges and corners in the display.
   g. Keep part of aisle clear for customer traffic
   h. Build display to prevent toppling and customer bumping.
PERFORMANCE GUIDE (Cont.)

7. Set up a display which:
   a. Avoids the use of lighting or other display techniques that will present a false impression of the merchandise
   b. Has only fresh and clean merchandise, props and accessories
   c. Has a definite theme or purpose
   d. Includes show and price cards that are informative, free of errors, dirt, smudges and that follow the purpose or theme of the display
   e. Has merchandise that is easy to reach
8. Dispose of all debris.
9. Return tools and materials to storage area.

*Note:
1. Large amounts of merchandise are displayed.
2. Similar or related items are often displayed with no spacing between groupings.
3. Spacing is made by grouping merchandise by type.
4. Merchandise size and form is used to give a separate appearance.
5. Merchandise can be arranged in the following ways:
   - single item arrangement
   - multiple item arrangement
   - jumble arrangement
6. Items in mass display have high volume sales potential.
7. Mass displayed items suggest buying to customers.
8. Mass display often suggests sale or special promotion items.
### INSTRUCTOR CHECKLIST: Set Up Mass Display

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
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<tbody>
<tr>
<td>The display:</td>
<td></td>
</tr>
<tr>
<td>1. Attracted the attention of customers?</td>
<td></td>
</tr>
<tr>
<td>2. Exhibited the principles of display?</td>
<td></td>
</tr>
<tr>
<td>3. Exhibited the following safety standards:</td>
<td></td>
</tr>
<tr>
<td>a. Props were structurally designed to safely support displayed merchandise?</td>
<td></td>
</tr>
<tr>
<td>b. Placement of merchandise was arranged so that no safety hazards existed?</td>
<td></td>
</tr>
<tr>
<td>c. Lighting or other electrical fixtures were placed to meet all safety requirements?</td>
<td></td>
</tr>
<tr>
<td>d. Flammable materials used in display were fire resistant as far as possible?</td>
<td></td>
</tr>
<tr>
<td>e. Display was not located in an area where it would block exits or entrances?</td>
<td></td>
</tr>
<tr>
<td>f. Display was free of sharp edges and corners?</td>
<td></td>
</tr>
<tr>
<td>4. Included clean and fresh merchandise?</td>
<td></td>
</tr>
<tr>
<td>5. Was designed around a definite theme or purpose?</td>
<td></td>
</tr>
<tr>
<td>6. Included showcards or price tags that were informative, free of errors, dirt, smudges, and followed the purpose of theme of the display?</td>
<td></td>
</tr>
<tr>
<td>7. Disposed of all debris?</td>
<td></td>
</tr>
<tr>
<td>8. Returned tools and materials?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:

IDECC 216/D32  Build mass display
189/D7  Know principles of mass display
230/D25  Use various types of display arrangements
190/D7  Know different types of display arrangements
178/D7  Know different types of display arrangements
231/D26  Use various types of display fixtures
174/D13  Know types of display fixtures
228/D24  Use principles of color, harmony, balance and proportion
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218/D28  Adjust display lighting
185/D16  Know how to adjust display lighting
894/S29  Display merchandise
805/S29  Know how to display merchandise
176/D15  Prepare merchandise for display

RETAILING I

TASK: Tidy Up Displays

PERFORMANCE OBJECTIVE: Provided displays, cleaning equipment, tools and materials, tidy up the displays. When finished all displays must be full; glass surfaces must be clean and polished; merchandise must be replenished, resized, restacked, and fronted. All rules of safety must be followed.

PERFORMANCE GUIDE:

1. Assemble cleaning tools and equipment:
   a. Vacuum cleaner
   b. Dust rags
   c. Feather duster
   d. Glass cleaner
   e. Rags for cleaning glass
   f. Squeegee

2. Inspect displays and complete the steps necessary to tidy them up:
   a. Dust
   b. Clean glass
   c. Add merchandise
   d. Restack merchandise
   e. Resize merchandise
   f. Front merchandise
   g. Clean props or fixtures
   h. Replace price tags or labels
   i. Replace merchandise in dust covers
   j. Dust shelves

3. Follow safety rules when cleaning:
   a. Avoid bumping display glass with body and tools
   b. Read and follow precautions printed on labels of cleaning agents
   c. Keep cleaning equipment, and materials away from customer traffic areas
   d. Immediately wipe up spills of cleaning liquids
References/Resources:

VTECS: Fashion Salesperson 11/23 Tidy up displays
IDECC 207/053 Rearrange or replace display items
177/08 Clean and straighten display

TASK: Dismantle Display

PERFORMANCE OBJECTIVE: Provided tools, cleaning equipment and an assembled display, dismantle the display. The display must be dismantled safely without damage to merchandise, props or accessories; all merchandise must be returned to the appropriate department; all display props must be returned to storage; and display area must be left neat and clean.

PERFORMANCE GUIDE:

1. Assemble tools and cleaning materials.
2. Adhere to following safety rules:
   a. Avoid bumping glass of window display area
   b. Avoid placing removed props, and merchandise in aisles or where entrances/exits will be blocked
   c. Handle all tools safely
   d. Obtain help when removing heavy objects
3. Dismantle display:
   a. Remove signs/show cards
   b. Remove accessory lighting fixtures
   c. Remove merchandise
   d. Remove props
   e. Remove backdrop
4. Return merchandise to department.
5. Return props, display materials, show cards and signs to storage.
6. Perform housekeeping activities:
   a. Clean windows
   b. Vacuum floor
   c. Dust props/fixtures
   d. Throw out all trash
References/Resources:

VTECS Fashion Salesperson 4/11 Dismantle display

IDECC 211/D8 Dismantle display

192/D8 Store display materials

DUTY AREA:
PERFORMING STORE OPERATING ACTIVITIES
RETAILING I

TASK: Open Store

PERFORMANCE OBJECTIVE: Provided a store and keys, open the store for a business day. Before opening, observations must be made to determine that no forced entry was made, alarm system was turned off, and that all entries are secure.

PERFORMANCE GUIDE:
1. Observe to determine that no one is loitering around the premises before unlocking the door.
2. Check to determine that there are no signs of forced entry before opening the door. Report any observed forced entry immediately to police. Do not move anything if there is any evidence of forced entry.
3. Unlock front door.
4. Turn off alarm system.
5. Observe to determine that windows and other entries are secure.
6. Proceed with assigned duties; for example:
   a. Turn on lights.
   b. Adjust thermostat.
References/Resources:
VTECS  Fashion Salesperson 41/57  Open Store
RETAILING I

TASK: Prepare Check-Out Area For Business Day

PERFORMANCE OBJECTIVE: Provided a check-out area and supplies, prepare the area for the business day. All the steps on the instructor's checklist must be performed acceptably.

PERFORMANCE GUIDE:

1. Clean cash register.
2. Check tape supply in register.
3. Replenish bag supply.
4. Dust shelves and merchandise in assigned area.
5. Clean check-out area.
6. Clean display props.
7. Remove all items from conveyor.
8. Return unsold merchandise which has collected on checkstand to stock.
### INSTRUCTOR CHECKLIST: Prepare Check-Out Area For Business Day

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleaned cash register?</td>
<td></td>
</tr>
<tr>
<td>Checked tape supply in cash register?</td>
<td></td>
</tr>
<tr>
<td>Replenished supply of bags?</td>
<td></td>
</tr>
<tr>
<td>Dusted merchandise and shelves in check-out area?</td>
<td></td>
</tr>
<tr>
<td>Cleaned check-out area?</td>
<td></td>
</tr>
<tr>
<td>Cleaned display props?</td>
<td></td>
</tr>
<tr>
<td>Removed all items from conveyor?</td>
<td></td>
</tr>
<tr>
<td>Returned unsold merchandise to stock?</td>
<td></td>
</tr>
</tbody>
</table>

*Acceptable | Unacceptable | N/A
References/Resources:

VTECS  Cashier-Checker 28/87  Prepare check-out area for business day
RETAILING I

TASK: Prepare Cash Drawer

PERFORMANCE OBJECTIVE: Given a cash drawer, change fund and a change fund receipt form, prepare the cash drawer for business. All the steps on the instructor's checklist must be acceptably completed.

PERFORMANCE GUIDE:

1. Count money received.
2. Fill out and sign receipt form showing amounts of each denomination and total amount of cash received.
3. Place change fund into appropriate sections in cash drawer.
<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Counted and receipted change fund?</td>
<td></td>
</tr>
<tr>
<td>2. Filled out and signed cash receipt form listing the amounts of each denomination and total amount of cash received?</td>
<td></td>
</tr>
<tr>
<td>3. Placed change fund into appropriate sections in cash drawer?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:

VTECS  Cashier Checker 5/13  Prepare cash drawer for daily business
RETAILING I

TASK. Fill Out Credit Application Form

PERFORMANCE OBJECTIVE: Provided a credit application form and a customer who wishes to apply for credit, fill out the form. The application information must be written legibly, all requested information completed, and the application must be signed by the applicant.

PERFORMANCE GUIDE:

1. Greet the customer (applicant).
2. Determine the customer's needs.
3. Obtain a credit application form.
4. Explain to the applicant that the credit application form must be completed before credit can be authorized.
5. Explain the store's policy concerning the waiting period before credit is approved.
6. Explain to the applicant that she/he can complete the credit application form or that you will be glad to assist them with filling it out.
7. Ask the applicant for the following information:
   a. Full name and name of spouse
   b. Current address
   c. Previous address
   d. Occupation
   e. Bank references
   f. Credit references
   g. Applicant's social security number
   h. Names of persons authorized to use the credit account
8. Request that the applicant sign the credit application.
9. Explain to the applicant that notification of approval will be forthcoming.
10. Thank the applicant.
11. Route the application to the store's credit department.
References/Resources:

VTECS  Fashion Salesperson 18/31  Fill out credit application form
IDECC  134/Com 23  Assist customer fill out credit application form
525/PS1  Know procedures for obtaining a credit card
601/021  Know how to interpret credit policies
RETAILING I

TASK: Receipt Customer's Accounts Receivable

PERFORMANCE OBJECTIVE: Provided a receipt form and information concerning amounts due on a charge account, fill out the receipt form. The receipt form must be completed legibly and accurately to include all requested information.

PERFORMANCE GUIDE:

1. Legibly write the customer's name on the receipt form.
2. Legibly write the customer's full address on the receipt form.
3. Legibly write the date of the transaction on the receipt form.
4. Legibly place a check in the received-on-account box printed on the receipt form.
5. Legibly write the total amount paid in the amount column.
6. Sign the receipt form.
7. Hand the customer their copy of the receipt form.
8. Retain store copy.
References/Resources:

VTECS  Cashier Checker 1/1  Accept and receipt customer's accounts receivable

IDECC  680/019  Receive and record customer payment of bills
            600/019  Know how to handle customer payment of bills
            595/019  Know billing procedures
TASK: Balance Cash Register

PERFORMANCE OBJECTIVE: Provided a cash register with a day's receipts and transaction forms in the cash drawer, a daily balance form and money bags, close out the cash register. When completed, required information must be accurately recorded on the daily balance form, and the specified amount of change must be left in the cash drawer.

PERFORMANCE GUIDE:

1. Insert the daily balance form into the cash register according to manufacturer's instructions.
2. Take a cash register reading.
3. Count and record the amount of coins and currency in the cash drawer.
4. Total and record the amount of checks in the cash drawer.
5. Count out a sufficient amount of coins and bills for use as the next day's change fund, and subtract this total from total cash. Enter this on the daily balance form as "cash in the drawer."
6. Place all cash and checks in the money bag.
7. Add all paid-outs and cash refunds and subtract this total from the cash total to obtain cash received total.
8. Compare total cash received with the audit strip reading to determine if register is "cash proved," "cash over," or "cash short."
9. Insert all monies, daily balance form, checks, overrings, underrings, voids, refunds and paid-outs into the money bag and send it to the accounting department.
10. Leave cash drawer open. (optional)
References/Resources:

**VTECS**  
*Fashion Salesperson 16/29* Close out cash register

*Cashier Checker 7/19* Close out cash register

*Hardware Salesperson 1/13* Balance cash drawer against register reading

**IDECC**  
*361/Math 16* Balance the cash register
*389/Math 17* Balance the cash register
*633/014* Balance cash register
*636/014* Prepare daily sales sheet
RETAILING I

TASK: Close Out Department

PERFORMANCE OBJECTIVE: Provide a department with merchandise and a cash register, "close-out" the department.

PERFORMANCE GUIDE:

2. Re-set cash register.
3. Turn in change fund and day's receipts.
4. Prepare daily report form.
5. Leave the register as instructed (drawer partially opened, drawer closed).
6. Straighten department.
7. Empty waste paper.
8. Shut drawers.
9. Turn off electrical appliances, if applicable.
10. Cover merchandise, if applicable.
11. Turn on security precautions.
12. Shut off lights.
<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Balanced cash register?</td>
<td></td>
</tr>
<tr>
<td>2. Re-set cash register?</td>
<td></td>
</tr>
<tr>
<td>3. Turned in change fund and day's receipts?</td>
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</tr>
<tr>
<td>4. Prepared daily report form?</td>
<td></td>
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<tr>
<td>5. Left the register as instructed (drawer partially opened, drawer closed)?</td>
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<tr>
<td>6. Straightened department?</td>
<td></td>
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<tr>
<td>7. Emptied waste paper?</td>
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<tr>
<td>8. Shut drawers?</td>
<td></td>
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<tr>
<td>9. Turned off electrical appliances, if applicable?</td>
<td></td>
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<tr>
<td>10. Covered merchandise, if applicable?</td>
<td></td>
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<tr>
<td>11. Turned on security precautions?</td>
<td></td>
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<tr>
<td>ACTIVITY</td>
<td>RATING</td>
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<tr>
<td>-------------------------------</td>
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</tr>
<tr>
<td>12. Shut off lights?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:

IDEC 632/014  "Close-out" the department
TASK: Fill Out Bank Deposit Forms

PERFORMANCE OBJECTIVE: Given a bank deposit form, checks, change, currency, and an adding machine, fill out the deposit form. All checks, currency and change must be listed and totaled without error and all identifying information must be correctly entered on the deposit form.

PERFORMANCE GUIDE:

1. Assemble deposit slip, checks, currency, coins, and adding machine at work area.
2. Count coins and write total in appropriate space on deposit slip.
3. Count currency and write total in appropriate space on deposit slip.
4. Endorse all valid checks.
5. Calculate total of all checks.
6. List each check by number and amount in appropriate space.
7. Enter total of checks on the face of the deposit slip.
8. Add totals of currency, coins, and checks and enter in appropriate space on deposit slip.
9. Write the following information on the face of the deposit slip in the appropriate spaces:
   a. Name of the above
   b. Address
   c. Account number
   d. Date
References/Resources:

VTECS Fashion Salesperson 17/30 Fill out bank deposit forms

Hardware Salesperson 21/14 Prepare bank deposit forms
RETAILING I

TASK: Close Store

PERFORMANCE OBJECTIVE: Provided a store and a key, close the store. When finished, all people must be out of the store, doors and windows must be locked, and security lights and alarm system must be on.

PERFORMANCE GUIDE:

1. Walk the store and check the following areas to determine that the store is secure:
   a. Elevators
   b. Doors leading to the outside
   c. All departments to determine that all people are out of the store
   d. Stairs and stairwells
   e. Restrooms
   f. Windows
   g. Dressing room
2. Turn on security lights, or check to determine that they have been turned on.
3. Turn on alarm system or check to determine that it has been turned on.
4. Check outside area of store, if making night deposit, to determine that no one suspicious is standing near by.
5. Close and lock door.
6. Double check to determine that door is securely locked.
References/Resources:

VTECS  Fashion Salesperson 40/56  Close store
RETAILING I

TASK: Detect And Report Shoplifting And Pilferage

PERFORMANCE OBJECTIVE: Provided a shoplifting situation, detect and report the incident. Following the incident, reasons for suspecting shoplifting must be reported and store policy for handling must be followed.

PERFORMANCE GUIDE:

SHOPLIFTING:
1. Follow store policy in detecting and reporting shoplifting.
2. Immediately greet all customers as they enter department/store, if applicable.
3. Watch as customers browse or shop department.
4. Observe for characteristics such as:
   a. Customers who carry large shopping bags
   b. Customers who exhibit nervous movement, especially shifty eyes
   c. Customers who try to avoid being noticed
   d. Customers who wear loose bulky coats or dresses
   e. Customers who try to carry numerous articles of clothing into fitting or dressing rooms.
5. Follow store policy concerning the number of articles of merchandise that a customer can take into fitting or dressing room at one time, if applicable.
6. Report observed shoplifting immediately to store manager or store security.
7. Do not make an effort to apprehend the shoplifter.
8. Explain to the store manager or store security exactly what was observed.
9. Let store manager or store security handle the situation.

PILFERAGE:
1. Observe person with unusual or suspicious behavior.
2. Mentally note the description of person and merchandise.
3. Notify manager or store security.
4. Give information to manager or store security.
References/Resources:

VTECS Hardware Salesperson 26/40 Detect and report a shoplifter
Fashion Salesperson 26/40 Detect and report shoplifting
IDECC 699/022 Recognize and handle shoplifters
651/022 Know how to recognize and handle shoplifters
DUTY AREA:
PERFORMING CASHIERING ACTIVITIES
TASK: Process Bank Card Sales Transactions

PERFORMANCE OBJECTIVE: Provided a customer who desires to make a bank card sales transaction, a merchandise bank card sales ticket and an imprinter, process the transaction. All required information must be entered on the bank card sales ticket, the ticket must be signed by the customer, and all procedures to validate the sales transaction must be performed.

PERFORMANCE GUIDE:

1. Ask the customer for bank card.
2. Check the credit card.
   a. If card is unsigned and the customer has positive identification, ask her/him to sign it.
   b. Compare the bank card against the card numbers on the most recent warning notice. If customer's number appears on the list, call the authorization center.
   c. Call the authorization center to verify customer's credit, or use computer equipment to get credit code.
3. Check the expiration date. If valid, continue processing. If card has expired, inform customer that purchase cannot be charged on the card.
4. Process the sales ticket through the imprinter with customer's card:
   a. Place credit card face-up in imprinter.
   b. Position sales draft face-up in imprinter.
   c. Imprint ticket. Check sales ticket to see that the following information is clearly printed:
      - Card holder's name
      - Expiration date
      - Account information
      - Merchant's name
5. Write the following information in the appropriate spaces:
   a. Date of sales transaction
   b. A description of merchandise
   c. Dollar amount of sale
   d. Dollar amount of the tax
   e. Total dollar amount of sale
   f. Credit card number
6. Ask the customer to sign the sales ticket. Check the signature to determine that it matches that signature on the card.
7. Call for authorization, if sales exceeds floor limit.
PERFORMANCE GUIDE (Cont.):

8. Check all copies of sales ticket to determine that each is legible.
9. Return the customer's bank card with copy of the sales ticket.
10. Keep both the "Merchant" and "Bank Copy."
11. Thank the customer for making the purchase.
References/Resources:

VTECS Fashion Salesperson 31/45 Process bank card sales transactions

IDECC 889/S16
- Handle charge sales transactions

814/S16
- Know how to handle a charge sales transaction

815/S16
- Know how to handle store and bank charge cards

824/S15
- Know the store's credit policies, terms, and plans

831/S17
- Know how to handle installment sales lay-away sales and COD sales

125/C29
- Write sales check

898/S13
- Write sales check

819/S13
- Know how to write a sales check

374/Math 10
- Calculate amount of customer's purchase

363/Math 12
- Compute discounts

362/Math 18
- Compute sales tax

360/Math 18
- Read and interpret self-computing charts
RETAILING I

TASK: Process Charge Sales Transactions

PERFORMANCE OBJECTIVE: Provided a customer who wishes to make a charge sales transaction, a credit card, a credit sales ticket, and a credit card imprinter, process the transaction. When the charge sales transaction is completed, all applicable information must be written on the credit sales ticket, the ticket must be signed by the customer and all mathematical computations must be correct.

PERFORMANCE GUIDE:

Charge Sales With a Charge Card:
1. Check the credit card for validity:
   a. Check to determine that the card has been signed by the customer
   b. Check the expiration date to determine that card is valid
   c. Check the card against the store's bulletin
2. Check the amount of the sale to determine that it does not exceed the floor sales limit.
3. Call for authorization if required by store policy.
4. Complete charge sales ticket as follows:
   a. Date the ticket
   b. Write salesperson number
   c. Write department number
   d. Enter the number of each item purchased
   e. Write a description of item purchased
   f. Enter the cost of each item
   g. Multiply and enter the cost of each item by the number purchased
   h. Add and enter costs of all purchased items
   i. Determine and enter the amount of sales tax, and enter on ticket
   j. Add the subtotal of merchandise to the amount of sales tax, and enter on ticket
   k. Place charge sales ticket and customer's charge card on imprinter and imprint
5. Tell customer and total cost of the transaction.
6. Ask the customer to sign the charge sales ticket.
7. Return to customer the charge card.
8. Ring on cash register if required.
9. Give the customer a copy of the charge sales ticket.
10. Put the store's copy of charge sales ticket in designated place.
11. Package the customer's merchandise.
12. Thank the customer for making the purchase of merchandise.
PERFORMANCE GUIDE (Cont.)

Charge Sales Without a Charge Card:
1. Date the charge form.
2. Write the customer's name and address.
3. Write an itemized list of merchandise purchased.
4. Calculate a sub-total of taxable merchandise.
5. Calculate applicable tax.
6. Add tax and sub-total of taxable merchandise.
7. Calculate total of non-taxable items, if applicable.
8. Add taxable and non-taxable items, if applicable.
9. Enter total of purchase.
10. Obtain customer's signature, if applicable.
12. Retain store copy and distribute according to store policy.
References/Resources:

VTECS Fashion Salesperson 33/48 Process charge sales transactions

Hardware Salesperson 16/29 Process a credit sale

IDECC 889/S16 Handle charge sales transactions

814/S16 Know how to handle a charge sales transaction

815/S16 Know how to handle store and bank charge cards

824/S15 Know the store's credit policies, terms, and plans

831/S17 Know how to handle installment sales, lay-away sales and COD sales

125/C29 Write sales check

898/S13 Write sales check

819/S13 Know how to write a sales check

374/Math 10 Calculate amount of customer's purchase

363/Math 12 Compute discounts

362/Math 18 Compute sales tax

36C/Math 18 Read and interpret self-computing charts

VTECS Cashier Checker 15/45 Write customer's charges
RETAILING I

TASK: Process Cash Sales Transactions

PERFORMANCE OBJECTIVE: Provided a cash sales ticket or cash register ticket, a customer with merchandise and money, process the cash sales transaction. All required information must be entered on the sales ticket, and all mathematical computations must be correct.

PERFORMANCE GUIDE:

1. To complete a cash sales ticket:
   a. Fill out the
      - Quantity of merchandise
      - Description of merchandise
   b. Total the cost of merchandise
   c. Enter the applicable amount of sales tax
   d. Add the cost of merchandise to the amount of sales tax
   e. Enter the total cost of the transaction
   f. Tell the customer the amount due
   g. Accept remittance (cash or check) and return any applicable change due the customer
      * Authorize customer check

2. To complete a sale on cash register:
   a. Place sales ticket in register
   b. Ring up the cost of each article of merchandise
   c. Sub-total the sale
   d. Enter applicable sales tax
   e. Total the sales transaction
   f. Tell the customer the amount due
   g. Accept customer's remittance (cash or check) and return any applicable change
   h. Authorize customer check, if applicable

3. Package the customer's purchase.
4. Give the customer a copy of the receipt of the sales transaction
5. Keep a store copy.
6. Express thanks to the customer for shopping at the store.
References/Resources:

VTECS Fashion Salesperson 32/47  Process cash sales transaction

Hardware Salesperson 13/26  Process a cash sale

IDECC 890/S14  Handle cash sales transactions
813/S14  Know how to handle cash sales transactions
832/S14  Know how to process checks received in payment
621/016  Know how to authorize customer checks
125/C29  Write sales check
898/S13  Write sales check
819/S13  Know how to write sales check

374/Math 10  Calculate amount of customer's purchase
363/Math 12  Compute discounts
362/Math 18  Compute sales tax
360/Math 18  Read and interpret self-computing charts
888/S11  Operate the cash register
371/Math 13  Operate the cash register
816/S11  Know how to operate the cash register
384/Math 5  Calculate the single price of a multiple priced item
371/Math 13  Make change
386/Math 13  Make change
896/S10  Make change
818/S10  Know how to make change
354/Math 15  Know how to correct cash register error
RETAILING I

TASK: Accept Valid Consumer Redeemable Coupons (Vendor and Store)

PERFORMANCE OBJECTIVE: Given specimen vendor and store coupons and an order of merchandise, check the coupons with the order and accept only those which are valid.

PERFORMANCE GUIDE:

1. Examine coupons for valid dates.
2. Inspect merchandise to determine that customer has purchased the correct item of merchandise.
3. If applicable, check to see that customer has purchased required amount of merchandise.
References/Resources:

VTECS  Cashier Checker 4/11  Accept valid consumer coupons (vendor and store)
RETAILING I

TASK: Determine Amount Of Sales Tax

PERFORMANCE OBJECTIVE: Provided an order of merchandise containing both taxable and nontaxable items, a list of taxable merchandise, and a tax chart, ring up the order. A correct total must be registered.

PERFORMANCE GUIDE:

1. Register each taxable and nontaxable item on the correct amount, department and taxable item keys.
2. Depress the taxable total key.
3. Determine the correct amount of tax to register by reading indicators or tax chart.
4. Depress the correct amount and tax key.
5. Depress the total key.
References/Resources:

VTECS Cashier Checker 8/21  Determine amount of sales tax
TASK: Authorize Customers' Checks

PERFORMANCE OBJECTIVE: Given three examples of customer checks, authorize the checks that are valid.

PERFORMANCE GUIDE:

1. Examine the check for acceptability.
   a. Identify the bank on which the check is drawn.
   b. Determine that the date is acceptable.
   c. Verify that the payee line is correctly filled in.
   d. Verify that the written amount and figure amount are in agreement.
   e. Ask customer for identification and write identifying numbers on back of check.
      -Driver's license
      -Credit cards
      -Social security number
   f. Verify that check is correctly signed by customer and matches the signature on driver's license.
   g. Determine that check has no alterations.

2. Authorize the check according to store policy.
   a. Initial the check.
   b. Determine whether further authorization is needed.
References/Resources:

VTECS Fashion Salesperson 24/38 Authorize customers' checks

Hardware Salesperson 14/27 Process a cash sale paid by check

IDECC 832/S14 Know how to process checks received in payment

621/016 Know how to authorize customer's check.
RETAINING I

TASK: Make Change

PERFORMANCE OBJECTIVE: Given a total cost for an order of merchandise and the amount of money submitted by customer, make change to the customer. All items on the instructor's checklist must be performed acceptably.

PERFORMANCE GUIDE:

1. For Change-Calculating Cash Registers
   a. Orally state the total cost of the order of merchandise
   b. Orally state the amount that the customer remits
   c. Place the customer's money on the cash register change plate
   d. Orally count back to the customer the amount of change due, beginning with the largest denominations (bills) and closing with coins
   e. Place customer's money into cash drawer after they have acknowledged receiving the correct change

2. For Nonchange-Calculating Cash Registers:
   a. State orally the total amount of purchase
   b. State orally the amount of customer's remittance
   c. Place customer's remittance on cash register change plate
   d. Silently count starting at the total cost to customer and add up to the amount remitted, as you are obtaining cash from the cash drawer.
   e. Use the largest denomination of coins and bills available for change.
   f. Count aloud starting at the total cost to customer as you are returning change to customer.
   g. Count up to the total amount rendered by the customer.
   h. Place customer's remittance into cash drawer only after customer has acknowledged receiving correct amount.
## INSTRUCTOR CHECKLIST: Make Change

### ACTIVITY

<table>
<thead>
<tr>
<th>Activity</th>
<th>Rating</th>
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<tbody>
<tr>
<td><strong>1. For Change-Calculation Cash Register:</strong></td>
<td></td>
</tr>
<tr>
<td>a. Orally stated the total amount of purchase?</td>
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<tr>
<td>b. Orally stated the amount of customer remittance?</td>
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<tr>
<td>c. Placed customer's remittance on cash register change plate?</td>
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<tr>
<td>d. Orally counted the change to customer?</td>
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<tr>
<td>e. Returned change in largest denominations of bills and coins?</td>
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</tr>
<tr>
<td>f. Placed customer's remittance into cash drawer only after customer had acknowledged receiving correct change?</td>
<td></td>
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<tr>
<td><strong>2. For Nonchange-Calculation Cash Register:</strong></td>
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<td>a. Stated orally the total amount of purchase?</td>
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<td>c. Placed customer's remittance on cash register change plate?</td>
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<tr>
<td>d. Silently counted starting at the total cost to customer and added up to the amount remitted, while obtaining cash from the cash drawer?</td>
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<tr>
<td>e. Used the largest denomination of coins and bills available for change?</td>
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<td>f. Counted aloud starting at the total cost to customer while returning change to customer?</td>
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<tr>
<td>g. Counted up to the total amount rendered by the customer?</td>
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<td>h. Placed customer's remittance into cash drawer only after customer had acknowledged receiving correct amount?</td>
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</tbody>
</table>
References/Resources:

VTECS  Cashier Checker 14/41  Make change
TASK: Issue Trading Stamps

PERFORMANCE OBJECTIVE: Given an order of merchandise, ring up the order and issue trading stamps on all eligible items. All items on the instructor's checklist must be acceptably completed.

PERFORMANCE GUIDE:

1. Set aside ineligible items (cigarettes, alcoholic beverages and/or other items according to state law).
2. Ring up and sub-total eligible items.
3. Issue on trading stamp per 10¢ in the largest denominations available.
4. Ring up ineligible items.
5. Ring up taxable total.
6. Determine amount of tax.
7. Ring tax.
8. Ring total.
### Instructor Checklist: Issue Trading Stamps

<table>
<thead>
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<th>Activity</th>
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</tr>
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<tbody>
<tr>
<td>1. Set aside ineligible items? (cigarettes, alcoholic beverages and/or other items according to state law)</td>
<td></td>
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<tr>
<td>2. Rang up and sub-totaled eligible items?</td>
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<tr>
<td>3. Issued one trading stamp per 10¢ in the largest denominations available?</td>
<td></td>
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<tr>
<td>4. Rang up ineligible items?</td>
<td></td>
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<tr>
<td>5. Rang up taxable total?</td>
<td></td>
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<tr>
<td>6. Determined amount of tax?</td>
<td></td>
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<tr>
<td>7. Rang tax?</td>
<td></td>
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<tr>
<td>8. Rang total?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:

VTECS Cashier Checker 12/35 Issue trading stamps
RETAILING I

TASK: Package/Bag Customer's Orders Of Merchandise

PERFORMANCE OBJECTIVE: Provided merchandise, boxes, scissors, bags, wrapping paper, packing material, wrapping tape and wrapping area, package the merchandise. The package must be appropriate for the type of merchandise, must be secure and must have receipt attached.

PERFORMANCE GUIDE:

Packaging:
1. Inspect the merchandise to determine that it is in good condition before packaging it.
2. Select the best method for packaging the merchandise:
   a. Bagging
   b. Boxing
   c. Wrapping
3. Assemble the materials for packing the merchandise:
   a. Scissors
   b. Wrapping paper
   c. Bags
   d. Boxes
   e. Tissue paper
   f. Packing material
   g. Tape
4. Package merchandise:
   - Slip a plastic dust cover over
   - Wrap each item
5. Box items:
   a. Select appropriate size box
   b. Line the box with tissue paper
   c. Place merchandise in the box
   d. Fold the sides of the tissue paper over the merchandise
   e. Close box and secure with fastener or tape
6. Place merchandise in bag.
7. Attach sales receipt or tag showing customer has paid for merchandise.
8. Thank the customer for making the purchase.
PERFORMANCE GUIDE (Cont.):

Bagging:
1. Select proper bag size for the order of merchandise.
2. Open the bag carefully without tearing.
3. Place bag on bagging shelf or on the check-out counter
4. Place heavy items in bottom of bag.
5. Place rectangular items along the sides of the bag.
6. Place glass items in protected space in bag.
7. Place fragile and crushable items in the top of bag.
8. Place small items between merchandise of different shape.
9. Distribute heavy and light items evenly among bags.
10. Place moist items in insulated or polybags.
11. Place odor-producing merchandise in separate appropriate-sized bag, then into larger bags.
12. Check tops of hazardous items. Tighten if loose.
13. Place hazardous products in separate bags.
14. Check checkstand to see that all merchandise has been bagged.
15. Load cart, if applicable.
16. Give claim check to customer, if applicable.
References/Resources:

- VTECS Fashion Salesperson 30/44 Package customers' purchase
- Cashier Checker 33/97 Bag Customer's Order of Merchandise
- IDECC 887/S18 Pack and/or wrap merchandise
- 552/PS37 Pack and/or wrap merchandise
- 629/Mdse 32 Know wrapping/packaging methods
DUTY AREA:
PERFORMING CUSTOMER SERVICE ACTIVITIES
RETAILING I

TASK: Process Installment Credit Sales

PERFORMANCE OBJECTIVE: Provided a customer who wishes to make an installment credit sales transaction, an installment sales credit form and merchandise, process the sales transaction. All applicable information must be written on the credit form, and the customer must be aware of the amount of interest and principal that will have to be paid.

PERFORMANCE GUIDE:

Conclude the sales transaction:
1. Ask the customer for the following information and write it in the appropriate spaces on the installment credit sales form:
   a. Name and address
   b. Date of the sales transaction
   c. A description of the merchandise
   d. Price of the merchandise
   e. Department identification
   f. Salesperson identification
   g. Subtotal (cost) of merchandise
   h. Amount of applicable sales tax
   i. Total cost of the transaction
2. Add the cost of the finance charge to the total cost of the merchandise and write this total on the installment credit form.
3. Divide the total cost of the transaction by the number of payments.
4. Tell the customer the cost of finance charges and the annual percentage rate, following Truth and Lending Statutes.
5. Ask customer if he/she has any questions concerning the transaction.
6. Ask the customer to sign the installment credit sales form.
7. Give the customer a copy of the installment credit sales agreement.
8. Route other copies of the installment sales agreement to the accounting department.
References/Resources:

VTECS Fashion Salesperson 36/52 Process installment credit sales

IDECC 831/517 Know how to handle installment sales
TASK: Process Lay-Away Sales

PERFORMANCE OBJECTIVE: Provided a customer who wishes to make a purchase on lay-away, merchandise and a lay-away sales ticket, process the sale. All required information must be legibly written on the lay-away sales ticket, and all mathematical computations must be correct.

PERFORMANCE GUIDE:

1. Legibly write the lay-away sales ticket. Include the following information:
   a. Customer's name, address and phone number
   b. Salesperson's identification number
   c. Department number
   d. A description of the merchandise
   e. Price of the merchandise
   f. Sub-total cost of the merchandise
   g. Sales tax, if applicable
   h. Sub-total of sales tax plus the cost of the merchandise plus lay-away fee
   i. Deposit made by customer
   j. Difference between total cost of merchandise and deposit
   k. Date the merchandise will be paid - out of lay away

2. Have customer sign the lay-away sales ticket.
3. Collect the deposit payment from the customer.
4. Give the customer a copy of the lay-away sales ticket.
5. Attach a copy to the merchandise.
6. Route a copy to the accounting department.
7. Send merchandise to lay-away storage.
References/Resources:

VTECS  Fashion Salesperson 37/53  Process lay-away sales
  Hardware Salesperson 17/30  Process a lay-away sale

IDECC  834/S17  Know the store's policy concerning lay-away
  831/S17  Know how to handle lay-away sales
  363/Math 12  Compute lay-away charge
RETAILING I

TASK: Write Customers' Telephoned Orders

PERFORMANCE OBJECTIVE: Given a customer making an order by telephone and an order pad, answer the call and write the order. The order must include customer's name and account number and merchandise requested, (delivery instructions as verified by the caller if requested).

PERFORMANCE GUIDE:

1. Answer the telephone.
2. Speak clearly using a friendly tone of voice identifying shop and self by name.
3. Quote prices of merchandise when asked by customer.
4. Write names and all information legibly and without spelling errors.
5. Write delivery instructions.
6. Write enclosure card message.
7. Verify customers' charge account.
8. Write the name and address of the recipient.
9. Read the finished order to the caller.
10. Close the telephone call.
References/Resources:

VTECS Retail Flowershop Salesperson 30/1:8 Write customer's telephoned order

IDECC 835/S21 Handle telephone and mail orders
115/Com 2 Handle telephone and mail orders
556/PS25 Quote delivery dates and charges
503/PS25 Know delivery area served by store, delivery charges, and delivery schedules
624/Mdse 31 Know types of delivery systems
RETAILING I

TASK: Fill Mail And Telephone Orders

PERFORMANCE OBJECTIVE: Given a mailed or telephoned order for merchandise, fill the order. When finished, the order form should be correctly totaled, the merchandise packaged and placed in the customer pick-up or delivery area.

PERFORMANCE GUIDE:

1. Read the order form to obtain information concerning requested merchandise:
   a. Kind
   b. Color
   c. Size
   d. Style
   e. Price
   f. Quantity requested
2. Determine mode of payment.
3. Assemble the merchandise.
4. Write sales ticket.
5. Package the merchandise:
   a. Gift wrap if requested
   b. Bag or box the merchandise
6. Tape a copy of the order and sales ticket on the package.
7. Place the package in customer pick-up or delivery area.
References/Resources:

VTECS  Fashion Salesperson 27/41  Fill mail and telephone orders
IDECC  835/S21  Handle telephone and mail orders
         115/Com 24  Handle telephone and mail orders
         114/Com9  Know how to handle telephone and mail orders
         008/A7  Know how to handle telephone and mail orders
RETAILING I

TASK: Write Delivery Order

PERFORMANCE OBJECTIVE: Given a request for merchandise to be delivered, delivery form and special instructions, write a delivery order. All pertinent information must be listed according to store policy.

PERFORMANCE GUIDE:

1. Secure a delivery form.
2. List customer name, address and phone number.
3. Give delivery destination.
4. List items to be delivered.
5. Given time of delivery, date and special instructions.
7. Label items to be delivered.

*Note: There may be a delivery charge.
References/Resources:

**VTECS** Hardware Salesperson 20/33 Write a delivery order

**IDECC 556/PS25** Quote delivery date and charge

503/PS25 Know delivery area served by store, delivery
833/S20 charges and delivery schedule

624/Mdse 31 Know types of delivery systems
TASK: Gift Wrap Customer's Purchase

PERFORMANCE OBJECTIVE: Given merchandise and access to gift wrapping tools and materials, gift wrap the merchandise. The finished package must compare with the instructor's model.

PERFORMANCE GUIDE:

1. Assemble tools and supplies at the work area:
   - Scissors (paper and ribbon)
   - Cellophane tape
   - Ribbon
   - Gift wrap paper
   - Tie-ons
2. Remove all price tags from the merchandise.
3. Place tissue liner in box.
4. Place merchandise and sender's card in gift box.
5. Cut a piece of wrapping paper so that it will be approximately twice the length of the largest dimension of the box and extends over both ends of the box slightly more than half the box.
6. Turn the box upside down and center it over the wrapping paper.
7. Pull the sides of the paper over the box. Turn 1/4" overlap and tape.
8. Fold the ends of the bottom to form a neat closure.
9. Tape the bottom flap of the wrapping.
10. Tie ribbon around box.
11. Tie bow; fasten bow and other novelty accessories to box.

*Note: Sender's card may be attached on outside of gift box.
TASK: Process Customer's Exchange

PERFORMANCE OBJECTIVE: Provided a customer with merchandise to exchange, process the customer's request. The exchange must be made according to store policy; money, credit or additional paid by customer must be accounted for; reason for exchange must be noted on exchange form.

PERFORMANCE GUIDE:

1. Check the customer's sales slip to determine type of sale.
2. Process exchanges according to store policy. For example:
   a. Exchange the merchandise for another item if sales receipt is lost
   b. Give cash refunds only if customer has a sales receipt and if the exchange is requested within store's specified time period
   c. Give merchandise exchange only on sale merchandise
   d. Give merchandise exchange only; no cash refunds
3. Maintain a good relationship with the customer throughout the process of exchanging merchandise to keep the customer satisfied.
4. Complete store merchandise exchange forms according to store policy. Obtain the following:
   a. Customer's name, address, telephone number
   b. Description of item being exchanged, its price and condition
   c. Reason for exchange
   d. Customer's signature
   e. Co-signature if required
References/Resources:

VTECS  Fashion Salesperson 34/50  Process customer's exchanges

IDECC  879/S19  Handle merchandise returns

817/S19  Know how to handle merchandise returns

547/PS40  Analyze returned merchandise
RETAILING I

TASK: Process Customer's Refund

PERFORMANCE OBJECTIVE: Provided a customer who desires a cash refund, merchandise, customer sales receipt, and a cash refund book, process the refund. When finished, all applicable information must be written on the refund form, and all applicable monies must be returned to customer.

PERFORMANCE GUIDE:

1. Determine whether refund can be made (based on store policy).
2. Write cash refund ticket including the following information:
   a. Customer's name
   b. Customer's complete address
   c. Name of department from which the merchandise was purchased
   d. Date merchandise was purchased
   e. Salesperson who sold item of merchandise
   f. Description of merchandise
   g. Quantity of merchandise purchased to be refunded
   h. Price of merchandise
   i. Subtotal cost of merchandise purchased
   j. Amount of tax paid by customer
   k. Total cost of purchase to be refunded
   l. Initials of salesperson making refund
   m. Current date
3. Ask customer to sign refund slip.
4. If applicable, obtain authorization from proper store employee.
5. Give customer cash refund.
6. Place store copy of cash refund slip in cash drawer of cash register.

*Note: Credit slip/credit due may be used.
References/Resources:

**VTECS**  Fashion Salesperson 38/54  Process refunds

**Hardware Salesperson 11/24**  Make refund for returned merchandise

**IDECC**  879/S19  Handle merchandise returns

  817/S19  Know how to handle merchandise returns

  547/PS40  Analyze returned merchandise
RETAILING I

TASK: Adjust Or Refer Customer Complaints

PERFORMANCE OBJECTIVE: Given examples of customer complaints, adjust each complaint. Each activity on the instructor's checklist must be performed acceptably.

PERFORMANCE GUIDE:

1. Courteously listen attentively to everything the customer has to say before replying.
2. Agree with the customer that she/he has a right to complain.
3. Make appropriate adjustment according to store policy.
4. Refer the customer to the person in the store who is authorized to adjust complaints.
5. Maintain composure and avoid arguing with customers.
# INSTRUCTOR CHECKLIST: Adjust And/Or Refer Customer Complaints

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Courteously listened to everything the customer had to say before replying?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2. Agreed with the customer that she/he had a right to complain?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Made appropriate adjustment according to store policy?</td>
<td></td>
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</tr>
<tr>
<td>4. Referred the customer to the person in the store who is authorized to adjust complaints?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Maintained composure and avoided arguing with customer?</td>
<td></td>
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</tr>
</tbody>
</table>
References/Resources:

**VTECS Cashier Checker 29/89** Refer customer complaints to proper store authority

**Cashier Checker 32/95** Adjust customer's complaints

**IDECC 115/Com 20**
**823/S60** Handle customer inquiries and complaints

**280/HR28** Know how to handle customer complaints

**261/H47** Know the importance of human relations

**871/S58** Suggest substitute merchandise

**507/PS28** Know the location of merchandise on the selling floor or in storage

**505/PS19** Know merchandise size, color, style and price available

**117/Com 20** Interpret store policies for customers
TASK: Answer Customer Inquiries Concerning Directions; Concerning Customer Facilities; Concerning Store Policies

PERFORMANCE OBJECTIVE: Given case studies of customer inquiries, answer all of the inquiries according to store policy. All applicable items on the instructor's checklist should be performed acceptably.

PERFORMANCE GUIDE:

1. Listen courteously to customer's inquiry.
3. Give specific directions to merchandise and/or customer facilities or take customer.
4. Give explanation of store policy.
5. Refer customer to appropriate personnel if unable to help.
<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Listened courteously to customer's inquiry?</td>
<td></td>
</tr>
<tr>
<td>2. Answered courteously and did not ignore inquiry?</td>
<td></td>
</tr>
<tr>
<td>3. Gave specific directions to merchandise or took customer?</td>
<td></td>
</tr>
<tr>
<td>4. Gave explanation of store policy?</td>
<td></td>
</tr>
<tr>
<td>5. Referred customer to appropriate personnel if unable to help?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:

VTECS  Cashier Checker 31/93  Answer customer inquiries concerning directions and products

IDECC  116/Com 20  Handle Customer Inquiries and Complaints (merchandise and/or store services)

261/HR47  Know the importance of human relations

623/Mgt. 25  Know the location and availability of customer facilities

042/Adv 7  Inform customer of advertised merchandise

003/Adv 7  Know prices available sizes, colors, styles, or models of advertising merchandise

014/Adv 2  Know available supply of merchandise advertised

194/022  Answer customer request for displayed merchandise

871/S58  Suggest substitute merchandise

507/PS28  Know substitute items

505/PS28  Know location of merchandise on selling floor or in storage

506/PS36  Know merchandise size, color, style and price available

117/Com 20  Interpret store policies for customers

194/022  Answer customer request for displayed merchandise

048/Adv 7  Inform customers of special in-store events/promotions
DUTY AREA:
PERFORMING SELLING ACTIVITIES
RETAILING I

TASK: Make a Sales Presentation

PERFORMANCE OBJECTIVE: Provided merchandise and a customer, make a sales presentation. All applicable items on the instructor's checklist must be completed.

PERFORMANCE GUIDE:

1. Open the sales presentation.
2. Demonstrate the merchandise.
3. Translate selling features into customer benefits.
4. Compare competing products to one's own product.
5. Assist customers interpret stamps, tags, etc.
6. Explain merchandise guarantees and directions to customers.
7. Explain grades to customers, if applicable.
8. Translate technical words, if applicable.
9. Handle customer objections.
10. Handle difficult customers.
11. Suggest substitute merchandise.
12. Suggest advertised merchandise.
13. Close the sale.
14. Suggest accessory items.
## Instructor Checklist (Cont.)

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>12. Suggested advertised merchandise?</td>
<td></td>
</tr>
<tr>
<td>13. Closed the sale?</td>
<td></td>
</tr>
<tr>
<td>14. Suggested accessory items?</td>
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</tr>
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</table>

<table>
<thead>
<tr>
<th></th>
<th>Acceptable</th>
<th>Unacceptable</th>
<th>N/A</th>
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<tbody>
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</tr>
</tbody>
</table>
References/Resources:

IDECC 869/S31  Open sales presentation

812/S30  Know how to open sales presentation

511/PS32  Know how to use merchandise information (merchandise approach) in opening a sale

830/S40  Know how to analyze customer needs

506/PS36  Know merchandise size, color, style, price, etc. available

505/PS19  Know the location of merchandise on the selling floor or in storage

893/S46  Demonstrate merchandise

806/S46  Know how to demonstrate merchandise

550/PS32  Translate selling features into customer benefits

827/S34  Know the selling features of merchandise and services

501/PS35  Know how to show that merchandise is suitable for customer needs and purposes

499/PS34  Know how to interpret product features in terms of customer benefits

551/PS32  Prepare a sales talk using selling features

132/Comm11  Write descriptive sales phrases and sentences

548/PS35  Use merchandise information in selling

514/PS33  Know product features and customer acceptance of competing products

822/S34  Know how to use product information

513/PS29  Know current trends, product innovations, etc.

517/PS 20  Know how to acquire product information from hangtags, labels, and directions

502/PS20  Know the sources of product information

435/Mdse 58  Read trade journals and buying office aids

022/Adv 3  Know how to use manufacturers' brochures and pamphlets
<table>
<thead>
<tr>
<th>IDECC 039/Adv 7</th>
<th>Analyze advertisement for selling information</th>
</tr>
</thead>
<tbody>
<tr>
<td>555/PS21</td>
<td>Know how to use information from advertisements in selling</td>
</tr>
<tr>
<td>561/PS38</td>
<td>Use brand/trade names</td>
</tr>
<tr>
<td>518/PS38</td>
<td>Know the use of brand/trade names</td>
</tr>
<tr>
<td>519/PS38</td>
<td>Know the use of brand/trade names</td>
</tr>
<tr>
<td>012/Adv 2</td>
<td>Know effects of brand names</td>
</tr>
<tr>
<td>553/PS33</td>
<td>Compare competing products to one's own product</td>
</tr>
<tr>
<td>563/PS33</td>
<td>Use product comparison in selling</td>
</tr>
<tr>
<td>508/PS35</td>
<td>Know uses of merchandise and differences between similar items</td>
</tr>
<tr>
<td>546/PS22</td>
<td>Make comparison shopping trips</td>
</tr>
<tr>
<td>559/PS20</td>
<td>Assist customers interpret stamps, tags, etc.</td>
</tr>
<tr>
<td>554/PS28</td>
<td>Explain merchandise guarantees and directions to customers</td>
</tr>
<tr>
<td>512/PS28</td>
<td>Know the purpose of merchandise guarantees and directions</td>
</tr>
<tr>
<td>558/PS30</td>
<td>Explain grades to customers</td>
</tr>
<tr>
<td>515/PS31</td>
<td>Know protective features of standards, grades, and labels</td>
</tr>
<tr>
<td>516/PS30</td>
<td>Know merchandise grade markings</td>
</tr>
<tr>
<td>521/PS31</td>
<td>Know laws regarding standards and grades</td>
</tr>
<tr>
<td>522/PS31</td>
<td>Know the provisions in the Pure Food, Drug and Cosmetic Act</td>
</tr>
<tr>
<td>523/PS31</td>
<td>Know the Federal Trade Commission protective measures</td>
</tr>
<tr>
<td>524/PS31</td>
<td>Know the consumer protection agencies</td>
</tr>
<tr>
<td>143/Comm12</td>
<td>Translate technical words for customers</td>
</tr>
<tr>
<td>874/S49</td>
<td>Handle customer objections</td>
</tr>
<tr>
<td>897/S43</td>
<td>Handle difficult customers</td>
</tr>
<tr>
<td>810/S43</td>
<td>Know how to handle difficult customers</td>
</tr>
<tr>
<td>871/S58</td>
<td>Suggest substitute merchandise</td>
</tr>
<tr>
<td>References/Resources (Cont.)</td>
<td></td>
</tr>
<tr>
<td>-----------------------------</td>
<td></td>
</tr>
<tr>
<td>IDECC 507/PS28</td>
<td></td>
</tr>
<tr>
<td>826/S28 Know substitute items</td>
<td></td>
</tr>
<tr>
<td>882/875/S57 Suggest accessory items</td>
<td></td>
</tr>
<tr>
<td>809/S59 Know how to suggest accessory items</td>
<td></td>
</tr>
<tr>
<td>826/S28 Know locations of department and merchandise within store</td>
<td></td>
</tr>
<tr>
<td>877/S28 Suggest advertised merchandise</td>
<td></td>
</tr>
<tr>
<td>014/Adv 2 Know supply of advertised merchandise</td>
<td></td>
</tr>
<tr>
<td>895/876/S52 Close the sale</td>
<td></td>
</tr>
<tr>
<td>820/S52 Know how to close the sale</td>
<td></td>
</tr>
<tr>
<td>811/S50 Know how to help the customer make the buying decision</td>
<td></td>
</tr>
<tr>
<td>559/PS20 Use tags, stamps, wrappers, etc.</td>
<td></td>
</tr>
</tbody>
</table>
RETAILING I

TASK: Demonstrate Merchandise

PERFORMANCE OBJECTIVE: Provided an article of merchandise and a customer who is interested in having the item demonstrated, demonstrate the merchandise. The demonstration must include interesting and informative remarks regarding the merchandise and a showing of styles and colors. An effort must be made to involve the customer in the sale and to answer all of the customer's questions honestly.

PERFORMANCE GUIDE:

1. Open the sales demonstration by giving the customer some interesting and informative remarks about the item of merchandise.
2. Try to determine customer needs.
3. Show the customer an assortment of styles, colors, and patterns.
4. Show the customer the outstanding features of the merchandise.
5. Make an effort to involve the customer in the demonstration.
6. Answer customer's questions and objections honestly and forthrightly.
7. Appeal to the customer's senses during the demonstration:
   a. Feel
   b. Smell
   c. Taste
   d. Sight
8. Sell product benefits while demonstrating item of merchandise.
References/Resources:

VTECS  Fashion Salesperson 25/39  Demonstrate merchandise

IDECC  893/S46  Demonstrate merchandise

806/S46  Know how to demonstrate merchandise
DUTY AREA:
PERFORMING EMPLOYEE TRAINING ACTIVITIES
TASK: Assist With Training/Sponsoring New Employee

PERFORMANCE OBJECTIVE: Provided a new employee to be trained, assist with the training/sponsor the new employee. All applicable criteria on the instructor's checklist must be completed.

PERFORMANCE GUIDE:

1. Prepare the employee for training:
   a. Put trainee at ease.
   b. State specific job.
   c. Find out what trainee knows about the job.
   d. Develop interest and desire to learn.
   e. Place trainee in correct learning attitude.
2. Present the job:
   a. Tell and show and illustrate and question.
   b. One step at a time.
   c. Stress key points.
   d. Not more than trainee can master.
3. Try out performance:
   a. Have trainee do job and correct errors, if any.
   b. Have trainee do job again and explain.
   c. Have trainee explain KEY points.
   d. Question trainee--what, why, how.
   e. Continue until trainee knows what YOU know.
4. Follow-up:
   a. Put the trainee on their own.
   b. Tell trainee where to go for help.
   c. Check frequently and encourage questions.
   d. Taper off coaching.
**INSTRUCTOR CHECKLIST: Assist With Training/Sponsoring New Employees**

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Prepared the employee for training:</td>
<td></td>
</tr>
<tr>
<td>a. put trainee at ease?</td>
<td></td>
</tr>
<tr>
<td>b. stated specific job?</td>
<td></td>
</tr>
<tr>
<td>c. found out what trainee already knew about the job?</td>
<td></td>
</tr>
<tr>
<td>d. presented a positive attitude for learning?</td>
<td></td>
</tr>
<tr>
<td>2. Presented the job?</td>
<td></td>
</tr>
<tr>
<td>3. Tried out performance?</td>
<td></td>
</tr>
<tr>
<td>4. Followed-up?</td>
<td></td>
</tr>
</tbody>
</table>
References/Resources:
IDECC 282/HR58 Sponsor new employee
138/Com39 Assist with training of other
**RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS**  
**AS REFERENCED TO IDECC LEARNING ACTIVITY**  
**PACKAGES AND COMPETENCY NUMBERS**  
**RECEIVING CLERK**

<table>
<thead>
<tr>
<th>Competency Numbers</th>
<th>LAP Numbers</th>
<th>Psychomotor and Cognitive Skill Statements</th>
</tr>
</thead>
<tbody>
<tr>
<td>464</td>
<td>Mdse 19</td>
<td>Handle special orders of merchandise</td>
</tr>
<tr>
<td>404</td>
<td>Mdse 19</td>
<td>a. Know how to handle special orders of merchandise</td>
</tr>
<tr>
<td>835</td>
<td>S 21</td>
<td>Handle telephone and mail orders</td>
</tr>
<tr>
<td>115</td>
<td>Com 24</td>
<td>Handle telephone and mail orders</td>
</tr>
<tr>
<td>008</td>
<td>A 7</td>
<td>a. Know how to handle telephone and mail orders</td>
</tr>
<tr>
<td>114</td>
<td>Com 9</td>
<td>a. Know how to handle telephone and mail orders</td>
</tr>
<tr>
<td>359</td>
<td>Math 7</td>
<td>b. Compute postal and mail charges</td>
</tr>
<tr>
<td>116</td>
<td>Com 20</td>
<td>Handle customer inquiries</td>
</tr>
<tr>
<td>623</td>
<td>Mgt 25</td>
<td>a. Know the location and availability of customer facilities</td>
</tr>
</tbody>
</table>

**CUSTOMER SERVICE**

Handle special orders of merchandise  
- a. Know how to handle special orders of merchandise

Handle telephone and mail orders  
- a. Know how to handle telephone and mail orders

**STORE OPERATIONS**

Carry-out expense controls  
- a. Know operating expenses
- b. Know how to use expense controls
- c. Know supply expense controls
- d. Keep informed of new developments that might aid in reducing expenses

**INVENTORY**

Take physical inventory  
- a. Take stock count for inventory
- b. Know how to take a stock count for physical inventory

Prepare inventory control records and forms  
- a. Know how to prepare inventory control records and forms

**PRICING**

Price mark merchandise  
- a. Know how to operate price-marking equipment

Operate price-marking equipment  
- a. Know how to operate price-marking equipment

Put price tickets on merchandise  
- a. Know how to put price tickets on merchandise

Change prices on merchandise  
- a. Know methods and procedures for changing prices
- b. Know procedures for recording price changes

Know price marking bookkeeping procedures  
- Know store's pricing policies and price-line structure
## REceiving Clerk

<table>
<thead>
<tr>
<th>Competency Numbers</th>
<th>LAP Numbers</th>
<th>Psychomotor and Cognitive Skill Statements</th>
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</thead>
<tbody>
<tr>
<td>647</td>
<td>05</td>
<td>Know price marking terminology</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>RECEIVING PROCEDURES</strong></td>
</tr>
<tr>
<td>669</td>
<td>04</td>
<td>Unload delivery truck</td>
</tr>
<tr>
<td></td>
<td></td>
<td>a. Know how to unload a delivery truck</td>
</tr>
<tr>
<td>708</td>
<td>05</td>
<td>Process incoming merchandise</td>
</tr>
<tr>
<td></td>
<td></td>
<td>a. Check-in merchandise against the invoice</td>
</tr>
<tr>
<td>638</td>
<td>05</td>
<td>b. Know procedures for checking-in merchandise against the invoice</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Record incoming merchandise</td>
</tr>
<tr>
<td></td>
<td></td>
<td>a. Know receiving bookkeeping procedures</td>
</tr>
<tr>
<td>641</td>
<td>05</td>
<td>Determine shipping and receiving discrepancies</td>
</tr>
<tr>
<td>703</td>
<td>06</td>
<td>Know reasons for returning merchandise to management</td>
</tr>
<tr>
<td>413</td>
<td>Mdse 25</td>
<td>Handle incorrect amounts or types of merchandise</td>
</tr>
<tr>
<td></td>
<td>07</td>
<td>a. Know procedures for handling incorrect amounts or types of merchandise</td>
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<tr>
<td>639</td>
<td>07</td>
<td>File claims for merchandise damages, overages, and shortages on carriers or management</td>
</tr>
<tr>
<td></td>
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<td>a. Know the procedures for filing claims for merchandise overages and shortages on carriers or manufacturers</td>
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<tr>
<td>642</td>
<td>06</td>
<td>Report damaged merchandise</td>
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<tr>
<td></td>
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<td>a. Know procedures for reporting and handling damaged merchandise</td>
</tr>
<tr>
<td>634</td>
<td>011</td>
<td>Wrap or package merchandise for return to vendor</td>
</tr>
<tr>
<td>700</td>
<td>07</td>
<td>Follow-up on non-delivered or lost merchandise</td>
</tr>
<tr>
<td>706</td>
<td>06</td>
<td>a. Know how to follow-up non-delivered or lost merchandise</td>
</tr>
<tr>
<td>643</td>
<td>06</td>
<td>b. Know vendor to store transportation modes</td>
</tr>
<tr>
<td>646</td>
<td>03</td>
<td>Use receiving terminology</td>
</tr>
<tr>
<td>647</td>
<td>05</td>
<td>Use shipping terminology</td>
</tr>
<tr>
<td>378</td>
<td>Math 28</td>
<td>a. Know shipping terminology</td>
</tr>
<tr>
<td>702</td>
<td>04</td>
<td>Route merchandise to selling department or warehouse</td>
</tr>
<tr>
<td>366</td>
<td>Math 28</td>
<td>Calculate transportation charges</td>
</tr>
<tr>
<td>640</td>
<td>010</td>
<td>Use stockkeeping forms and reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td>a. Know how to use stockkeeping forms and reports</td>
</tr>
</tbody>
</table>

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**STOCKING**

Use stockkeeping forms and reports
RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS
AS REFERENCED TO IDECC LEARNING ACTIVITY
PACKAGES AND COMPETENCY NUMBERS
RECEIVING CLERK

<table>
<thead>
<tr>
<th>Competency Numbers</th>
<th>LAP Numbers</th>
<th>Psychomotor and Cognitive Skill Statements</th>
</tr>
</thead>
<tbody>
<tr>
<td>648</td>
<td>0 10</td>
<td>STORAGE Arrange merchandise in stockroom</td>
</tr>
<tr>
<td>282</td>
<td>HR 58</td>
<td>EMPLOYEE MANAGEMENT Sponsor new employees</td>
</tr>
<tr>
<td>138</td>
<td>Com 39</td>
<td>Assist with training of other employees</td>
</tr>
<tr>
<td>699</td>
<td>0 22</td>
<td>STORE SECURITY Recognize and handle shoplifters</td>
</tr>
<tr>
<td>651</td>
<td>0 22</td>
<td>a. Know how to recognize and handle shoplifters</td>
</tr>
<tr>
<td>660</td>
<td>0 2</td>
<td>STORE SAFETY Handle employee and customer accidents</td>
</tr>
<tr>
<td>732</td>
<td>0 2</td>
<td>a. Know how to handle employee and customer accidents</td>
</tr>
<tr>
<td>615</td>
<td>0 2</td>
<td>Carry-out safety procedures for handling equipment</td>
</tr>
<tr>
<td>696</td>
<td>0 1</td>
<td>a. Know safety procedures for handling equipment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Use stocking safety procedures</td>
</tr>
<tr>
<td></td>
<td></td>
<td>a. Know stocking safety procedures</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Handle and care for store equipment</td>
</tr>
<tr>
<td>Competency Numbers</td>
<td>LAP Numbers</td>
<td>Psychomotor and Cognitive Skill Statements</td>
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<tr>
<td>--------------------</td>
<td>-------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>014</td>
<td>Adv 2</td>
<td>Count stock to be advertised</td>
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<tr>
<td></td>
<td></td>
<td><strong>ADVERTISING</strong></td>
</tr>
<tr>
<td>224</td>
<td>D 26</td>
<td>Construct display fixtures and backgrounds</td>
</tr>
<tr>
<td>215</td>
<td>D 26</td>
<td>Construct display fixtures and backgrounds</td>
</tr>
<tr>
<td>226</td>
<td>D 27</td>
<td>Construct display fixtures and backgrounds</td>
</tr>
<tr>
<td>183</td>
<td>D 13</td>
<td>a. Know how to construct display fixtures</td>
</tr>
<tr>
<td>182</td>
<td>D 14</td>
<td>b. Know how to construct display backgrounds</td>
</tr>
<tr>
<td>188</td>
<td>D 13</td>
<td>a. Know how to use manufacturer's display aids</td>
</tr>
<tr>
<td>217</td>
<td>D 26</td>
<td>Dress mannequin</td>
</tr>
<tr>
<td>193</td>
<td>D 13</td>
<td>a. Know how to dress a mannequin</td>
</tr>
<tr>
<td>218</td>
<td>D 28</td>
<td>Adjust display lighting</td>
</tr>
<tr>
<td>185</td>
<td>D 16</td>
<td>a. Know how to use display lighting techniques</td>
</tr>
<tr>
<td>216/189</td>
<td>D 32/D 7</td>
<td>Build a mass display</td>
</tr>
<tr>
<td>209</td>
<td>D 32</td>
<td>Build displays of merchandise as it can be used</td>
</tr>
<tr>
<td>206</td>
<td>D 32</td>
<td>Build window display</td>
</tr>
<tr>
<td>205</td>
<td>D 32</td>
<td>Build counter display</td>
</tr>
<tr>
<td>203</td>
<td>D 32</td>
<td>a. Know display building techniques</td>
</tr>
<tr>
<td>201</td>
<td>D 32</td>
<td>b. Know how to use cartons, cases and boxes in building displays</td>
</tr>
<tr>
<td>190</td>
<td>D 7</td>
<td>c. Know types or arrangements or displays</td>
</tr>
<tr>
<td>207</td>
<td>D 33</td>
<td>Rearrange or replace display items sold from displays</td>
</tr>
<tr>
<td>177</td>
<td>D 8</td>
<td>Clean and straighten displays</td>
</tr>
<tr>
<td>211</td>
<td>D 8</td>
<td>Dismantle displays</td>
</tr>
<tr>
<td>192</td>
<td>D 8</td>
<td>Store display materials</td>
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<td><strong>CUSTOMER SERVICE</strong></td>
</tr>
<tr>
<td>116</td>
<td>Comm 20</td>
<td>Handle customer inquiries and complaints</td>
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<td>S 60</td>
<td>Handle customer inquiries and complaints</td>
</tr>
<tr>
<td>280</td>
<td>HR 28</td>
<td>a. Know how to handle customer complaints</td>
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<tr>
<td>261</td>
<td>HR 47</td>
<td>b. Know the importance of human relations</td>
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<tr>
<td>042</td>
<td>Adv 7</td>
<td>c. Inform customers of advertised merchandise</td>
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<tr>
<td>003</td>
<td>Adv 7</td>
<td>d. Know available sizes, colors, styles, or models of advertised merchandise</td>
</tr>
<tr>
<td>014</td>
<td>Adv 2</td>
<td>e. Know available supply of merchandise advertised</td>
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<tr>
<td>194</td>
<td>D 22</td>
<td>f. Answer customer request for displayed merchandise</td>
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<tr>
<td>871</td>
<td>S 58</td>
<td>g. Suggest substitute merchandise</td>
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<tr>
<td>507</td>
<td>PS 28</td>
<td>h. Know substitute items</td>
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<tr>
<td>505</td>
<td>PS 19</td>
<td>i. Know the location of merchandise on the sales floor or in storage</td>
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<td>Competency Numbers</td>
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<tr>
<td>506</td>
<td>PS 35</td>
<td>j. Know merchandise size, color, style and price available</td>
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<td>464</td>
<td>Mdse 19</td>
<td>Handle special orders of merchandise</td>
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<tr>
<td>404</td>
<td>Mdse 19</td>
<td>a. Know how to handle special orders of merchandise</td>
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<tr>
<td>835</td>
<td>S 21</td>
<td>Handle telephone and mail orders</td>
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<tr>
<td>115</td>
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<tr>
<td>114</td>
<td>Comm 9</td>
<td>a. Know how to handle telephone and mail orders</td>
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<tr>
<td>008</td>
<td>Adv 7</td>
<td>b. Know how to handle telephone and mail orders</td>
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<tr>
<td>359</td>
<td>Math 7</td>
<td>c. Compute postal and mail charges</td>
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<tr>
<td>857</td>
<td>S 18</td>
<td>Pack and/or wrap merchandise</td>
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<tr>
<td>552</td>
<td>PS 37</td>
<td>Pack and/or wrap merchandise</td>
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<tr>
<td>629</td>
<td>Mdse 32</td>
<td>a. Know wrapping and packaging methods</td>
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<tr>
<td>556</td>
<td>PS 25</td>
<td>Quote delivery costs and charges</td>
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<tr>
<td>503</td>
<td>PS 25</td>
<td>a. Know delivery area served by store, delivery charges, and delivery schedule</td>
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<tr>
<td>624</td>
<td>Mdse 31</td>
<td>b. Know types of delivery systems</td>
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**STOCKING**

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<thead>
<tr>
<th>Competency Numbers</th>
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<tr>
<td>504</td>
<td>PS 19</td>
<td>Stock Merchandise</td>
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<tr>
<td>838</td>
<td>S 24</td>
<td>a. Know how to stock merchandise</td>
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<tr>
<td>516</td>
<td>O 2</td>
<td>b. Know stocking safety procedures</td>
</tr>
<tr>
<td>840</td>
<td>S 23</td>
<td>c. Know the housekeeping duties performed for stock care</td>
</tr>
<tr>
<td>908</td>
<td>S 25</td>
<td>Rotate stock</td>
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<tr>
<td>698</td>
<td>O 8</td>
<td>Transfer stock</td>
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<tr>
<td>445</td>
<td>Mdse 3</td>
<td>Record transfer of stock</td>
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<tr>
<td>403</td>
<td>Mdse 30</td>
<td>a. Know the procedures for recording the transfer of stock</td>
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<tr>
<td>640</td>
<td>O 10</td>
<td>Use stockkeeping forms and reports</td>
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<tr>
<td>878</td>
<td>S 26</td>
<td>Locate and refill low stock items</td>
</tr>
<tr>
<td>881</td>
<td>S 27</td>
<td>Locate and arrange reserve stock</td>
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**STORAGE**

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<tr>
<td>648</td>
<td>O 10</td>
<td>Arrange merchandise in stockroom</td>
</tr>
<tr>
<td>615</td>
<td>O 2</td>
<td>a. Know types of merchandise storage</td>
</tr>
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<td>b. Know storage safety procedures</td>
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**ORDERING**

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<th>LAP Numbers</th>
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<tbody>
<tr>
<td>442</td>
<td>Mdse 28</td>
<td>Count stock for ordering</td>
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### RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS

**As referenced to IDECC Learning Activity Packages and Competency Numbers**

**STOCK CLERK**

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<thead>
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<td><strong>INVENTORY</strong></td>
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<tr>
<td>463</td>
<td>Mdse 26</td>
<td>Take physical inventory</td>
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<td>442</td>
<td>Mdse 28</td>
<td>a. Count stock for inventory</td>
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<tr>
<td>414</td>
<td>Mdse 27</td>
<td>b. Know how to take a stock count for physical inventory</td>
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<td>401</td>
<td>Mdse 27</td>
<td>c. Know the purpose of stock counts</td>
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<td>400</td>
<td>Mdse 3</td>
<td>d. Know how to prepare inventory control forms and records</td>
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<td>837</td>
<td>S 25</td>
<td>Prepare stock for inventory</td>
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<td><strong>RECEIVING</strong></td>
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<tr>
<td>708</td>
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<td>Check-in merchandise against the invoice</td>
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<tr>
<td>638</td>
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<td>a. Know procedures for checking-in merchandise against the invoice</td>
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<td>413</td>
<td>Mdse 25</td>
<td>Inspect merchandise for damages</td>
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<td>a. Know reasons for returning merchandise to manufacturer</td>
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<td>Report damaged merchandise</td>
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<td>a. Know procedures for reporting and handling damaged merchandise</td>
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<td>Handle incorrect amounts or types of merchandise</td>
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<td>a. Know procedures for handling incorrect types or amounts of merchandise</td>
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<td>Wrap or package merchandise for return to vendor</td>
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<td><strong>PRICING</strong></td>
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<td>710</td>
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<td>Operate price-marking machine</td>
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<td>a. Know how to operate price-marking machine</td>
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<td>Put price tickets on merchandise</td>
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<td>a. Know how to put price tickets on merchandise</td>
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<tr>
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<td>Change prices on merchandise</td>
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<tr>
<td>406</td>
<td>Mdse 40</td>
<td>a. Know the procedures/methods for changing prices</td>
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<td>Mdse 40</td>
<td>b. Know procedures for recording price changes</td>
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<td>Use price-marking terminology</td>
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<td>Mdse 38</td>
<td>Know the store's pricing policies and price-line structure</td>
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<tr>
<td>138</td>
<td>Comm 39</td>
<td>Assist with new employee training</td>
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<td>282</td>
<td>HR 58</td>
<td>Sponsor new employee</td>
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<tr>
<td>Competency Numbers</td>
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<td>STORE SECURITY</td>
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<tr>
<td>699</td>
<td>0 22</td>
<td>Recognize and handle shoplifters</td>
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<td>a. Know how to recognize and handle shoplifters</td>
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<td>STORE SAFETY</td>
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<td>Carry-out safety procedures for handling equipment</td>
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<td>a. Know safety procedures for handling equipment</td>
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<td>Handle and care for store equipment</td>
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<td>a. Know operating expenses</td>
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<td>619</td>
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<td>c. Know supply expense controls</td>
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RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS
SALESPERSON/SALES CLERK

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<tbody>
<tr>
<td>050</td>
<td>Adv 2</td>
<td>Selection of merchandise for advertising</td>
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<tr>
<td>004</td>
<td>Adv 2</td>
<td>a. Make comparison shopping trips</td>
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<td>b. Know how to make comparison shopping trips</td>
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<tr>
<td>230</td>
<td>D 25</td>
<td>Sketch and design display sets</td>
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<tr>
<td>190/178</td>
<td>D 7</td>
<td>a. Use various types of display arrangements</td>
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<tr>
<td>231</td>
<td>D 26</td>
<td>b. Know different types of display arrangements</td>
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<td>174</td>
<td>D 13</td>
<td>c. Use various types of display fixtures</td>
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<td>228</td>
<td>D 24</td>
<td>d. Know types of display fixtures</td>
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<td>179</td>
<td>D 10</td>
<td>e. Use principles of color, harmony, balance and proportion</td>
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<td>f. Know how to use principles of color, balance, and proportion</td>
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<td>Display Fixtures</td>
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<td>a. Dress mannequins</td>
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<td>D 13</td>
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<td>c. Use manufacturer's display aids</td>
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<td>Display signs</td>
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<td>a. Develop display signs</td>
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<td>D 17</td>
<td>c. Design and letter signs</td>
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<td>D 30</td>
<td>d. Know how to design and letter signs</td>
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<td>e. Use price cards</td>
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<td>f. Know how to use price cards</td>
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<td>D 32/S 29</td>
<td>Build displays</td>
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<td>191/805</td>
<td>D 7/S 29</td>
<td>a. Build displays of merchandise as it can be used</td>
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<td>b. Know how to build displays of merchandise as it can be used</td>
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<td>D 32</td>
<td>c. Know display building techniques</td>
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<td>D 32</td>
<td>d. Know how to use cartons, boxes and cases in building displays</td>
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<td>D 32</td>
<td>e. Build mass displays</td>
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<td>D 7</td>
<td>f. Know principles of mass display</td>
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<td>D 32</td>
<td>g. Arrange counter displays</td>
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<tr>
<td>206</td>
<td>D 32</td>
<td>h. Arrange window displays</td>
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<td>176</td>
<td>D 15</td>
<td>Prepare merchandise for display</td>
</tr>
<tr>
<td>207</td>
<td>D 33</td>
<td>Rearrange or replace display items sold from display</td>
</tr>
<tr>
<td>177</td>
<td>D 8</td>
<td>Clean and straighten display</td>
</tr>
<tr>
<td>211</td>
<td>D 8</td>
<td>Dismantle display</td>
</tr>
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<td>192</td>
<td>D 8</td>
<td>Store display materials</td>
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### Psychomotor and Cognitive Skill Statements

<table>
<thead>
<tr>
<th>Competency Numbers</th>
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<tr>
<td>869</td>
<td>S 31</td>
<td>SELLING</td>
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<tr>
<td>812</td>
<td>S 30</td>
<td>Open sales presentation</td>
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<td>PS 32</td>
<td>a. Know how to open a sales presentation</td>
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<tr>
<td>830</td>
<td>S 40</td>
<td>b. Know how to use merchandise information</td>
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<tr>
<td>506</td>
<td>PS 36</td>
<td>(merchandise approach) in opening a sale</td>
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<td>PS 19</td>
<td>c. Know how to analyze customer needs</td>
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<td></td>
<td>d. Know merchandise size, color, price, etc. available</td>
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<td>893</td>
<td>S 46</td>
<td>e. Know the location of merchandise on the selling floor on in storage</td>
</tr>
<tr>
<td>806</td>
<td>S 46</td>
<td>Demonstrate Merchandise</td>
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<td>550</td>
<td>PS 32</td>
<td>a. Know how to demonstrate merchandise</td>
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<tr>
<td>827</td>
<td>S 34</td>
<td>Translate selling features into customer benefits</td>
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<td>501</td>
<td>PS 35</td>
<td>a. Know the selling features of merchandise and services</td>
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<td>PS 34</td>
<td>b. Know how to show that merchandise is suitable for customer needs and purposes</td>
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<td>PS 32</td>
<td>d. Prepare a sales talk using selling features</td>
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<td>Comm 11</td>
<td>e. Write descriptive sales phrases and sentences</td>
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<tr>
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<td>PS 35</td>
<td>f. Use merchandise information in selling</td>
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<tr>
<td>514</td>
<td>PS 33</td>
<td>g. Know product features and customer acceptance of competing products</td>
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<td>S 34</td>
<td>h. Know how to use product information</td>
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<tr>
<td>513</td>
<td>PS 29</td>
<td>i. Know current trends, product innovations, etc.</td>
</tr>
<tr>
<td>517</td>
<td>PS 20</td>
<td>j. Know how to acquire product information from handtags, labels, and directions</td>
</tr>
<tr>
<td>559</td>
<td>PS 20</td>
<td>k. Use tags, stamps, wrappers, etc.</td>
</tr>
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<td>PS 20</td>
<td>l. Know the sources of product information</td>
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<td>Mdse 58</td>
<td>m. Read trade journals and buying office aids</td>
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<td>Adv 3</td>
<td>n. Know how to use manufacturer's brochures and pamphlets</td>
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<td>Adv 3</td>
<td>o. Analyze advertisements for selling information</td>
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<td>555</td>
<td>PS 21</td>
<td>p. Know how to use information from advertisements in selling</td>
</tr>
<tr>
<td>518/519</td>
<td>PS 38</td>
<td>q. Know brand and trade names</td>
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<td>r. Know the effects of brand names</td>
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<tr>
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<td>PS 33</td>
<td>s. Compare competing products to one's own product</td>
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<td>PS 33</td>
<td>t. Use product comparison in selling</td>
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<td>508</td>
<td>PS 35</td>
<td>u. Know uses of merchandise and differences between similar items</td>
</tr>
<tr>
<td>546</td>
<td>PS 22</td>
<td>v. Make comparison shopping trips</td>
</tr>
<tr>
<td>Competency Numbers</td>
<td>LAP Numbers</td>
<td>Psychomotor and Cognitive Skill Statements</td>
</tr>
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<td>-------------</td>
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<tr>
<td>554</td>
<td>PS 20</td>
<td>Assist customers interpret stamps, tags, etc.</td>
</tr>
<tr>
<td></td>
<td>PS 28</td>
<td>Explain merchandise guarantees and directions to customers</td>
</tr>
<tr>
<td>512</td>
<td>PS 28</td>
<td>a. Know the purpose of merchandise guarantees and directions to customers</td>
</tr>
<tr>
<td>558</td>
<td>PS 30</td>
<td>Explain grades to customers</td>
</tr>
<tr>
<td>515</td>
<td>PS 30</td>
<td>a. Know protective features of standards, grades and labels</td>
</tr>
<tr>
<td>516</td>
<td>PS 30</td>
<td>b. Know merchandise grade markings</td>
</tr>
<tr>
<td>521</td>
<td>PS 31</td>
<td>c. Know laws regarding standards and grades</td>
</tr>
<tr>
<td>522</td>
<td>PS 31</td>
<td>d. Know the provisions of the Pure Food, Drug and Cosmetic Act</td>
</tr>
<tr>
<td>523</td>
<td>PS 31</td>
<td>e. Know the Federal Trade Commission protective measures</td>
</tr>
<tr>
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<td>PS 31</td>
<td>f. Know the consumer protection agencies</td>
</tr>
<tr>
<td>143</td>
<td>Comm 12</td>
<td>Translate technical works for customers</td>
</tr>
<tr>
<td>874</td>
<td>S 49</td>
<td>Handle customer objections</td>
</tr>
<tr>
<td>897</td>
<td>S 43</td>
<td>Handle difficult customers</td>
</tr>
<tr>
<td>810</td>
<td>S 43</td>
<td>a. Know how to handle difficult customers</td>
</tr>
<tr>
<td>871</td>
<td>S 58</td>
<td>Suggest substitute merchandise</td>
</tr>
<tr>
<td>507</td>
<td>PS 28</td>
<td>a. Know substitute items</td>
</tr>
<tr>
<td>826</td>
<td>S 28</td>
<td>b. Know locations of departments and merchandise within the store</td>
</tr>
<tr>
<td>882/875</td>
<td>S 7</td>
<td>Suggest accessory items</td>
</tr>
<tr>
<td>809</td>
<td>S 59</td>
<td>a. Know how to suggest accessory items</td>
</tr>
<tr>
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<td>S 28</td>
<td>b. Know locations of department and merchandise within the store</td>
</tr>
<tr>
<td>877</td>
<td>S 28</td>
<td>Suggest advertised merchandise</td>
</tr>
<tr>
<td>809</td>
<td>S 59</td>
<td>a. Know how to suggest advertised merchandise</td>
</tr>
<tr>
<td>826</td>
<td>S 28</td>
<td>b. Know locations of department and merchandise within the store</td>
</tr>
<tr>
<td>014</td>
<td>Adv 2</td>
<td>c. Know supply of advertised merchandise</td>
</tr>
<tr>
<td>876/895</td>
<td>S 52</td>
<td>Close the sale</td>
</tr>
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<td>820</td>
<td>S 52</td>
<td>a. Know how to close the sale</td>
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<td>811</td>
<td>S 50</td>
<td>b. Know how to help the customer make the buying decision</td>
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<tr>
<td>889</td>
<td>S 16</td>
<td>Handle charge sales transactions</td>
</tr>
<tr>
<td>814</td>
<td>S 16</td>
<td>a. Know how to handle a charge sales transaction</td>
</tr>
<tr>
<td>815</td>
<td>S 16</td>
<td>b. Know how to handle store and bank charge cards</td>
</tr>
<tr>
<td>824</td>
<td>S 15</td>
<td>c. Know the store's credit policies, terms, and credit plans</td>
</tr>
<tr>
<td>827</td>
<td>S 17</td>
<td>d. Know how to handle installment sales, lay-away sales and COD sales</td>
</tr>
<tr>
<td>363</td>
<td>Math 12</td>
<td>e. Compute lay-away charges</td>
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<tr>
<td>898</td>
<td>S 13</td>
<td>f. Write a sales check</td>
</tr>
<tr>
<td>125</td>
<td>Comm 29</td>
<td>Write a sales check</td>
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RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS
AS REFERENCED TO IDECC LEARNING ACTIVITY
PACKAGES AND COMPETENCY NUMBERS
SALESPEOPLE/SALES CLERKS

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<thead>
<tr>
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<tr>
<td>819</td>
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<td>g. Know how to write a sales check</td>
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<tr>
<td>374, 374</td>
<td>Math 10</td>
<td>h. Calculate amount of customer's purchase</td>
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<td>363, 363</td>
<td>Math 12</td>
<td>i. Compute discounts</td>
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<tr>
<td>362, 362</td>
<td>Math 18</td>
<td>j. Compute sales tax</td>
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<td>360, 360</td>
<td>Math 18</td>
<td>k. Read and interpret self-computing charts</td>
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<td>l. Prevent cash transactions</td>
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<td>813, 813</td>
<td>S 14</td>
<td>a. Know how to handle cash sales transactions</td>
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<td>S 14</td>
<td>b. Know how to process checks received for payment</td>
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<td>S 13</td>
<td>d. Write sales checks</td>
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<td>Comm 29</td>
<td>e. Write sales checks</td>
</tr>
<tr>
<td>819</td>
<td>S 13</td>
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<td>374</td>
<td>Math 10</td>
<td>g. Calculate amount of customer's purchase</td>
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<td>363, 363</td>
<td>Math 12</td>
<td>h. Compute discounts</td>
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<td>362, 362</td>
<td>Math 18</td>
<td>i. Compute sales tax</td>
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<td>Math 18</td>
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<td>888, 371</td>
<td>S 11</td>
<td>l. Operate the cash register</td>
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<tr>
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<td>384</td>
<td>Math 5</td>
<td>b. Calculate the single price of a multiple priced item</td>
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<td>S 10</td>
<td>c. Make change</td>
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<td>371, 386</td>
<td>Math 13</td>
<td>d. Make change</td>
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<td>818</td>
<td>S 10</td>
<td>e. Make change</td>
</tr>
<tr>
<td>354</td>
<td>Math 15</td>
<td>f. Know how to make change</td>
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<tr>
<td>134</td>
<td>Comm 23</td>
<td>g. Know how to correct cash register errors</td>
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<tr>
<td>525, 116</td>
<td>PS 1</td>
<td>a. Assist customer fill-out credit application forms</td>
</tr>
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<td>601, 823</td>
<td>O 21</td>
<td>b. Know the procedures for obtaining a credit card</td>
</tr>
<tr>
<td>918, 280</td>
<td>Comm 21</td>
<td>c. Know how to interpret credit policies</td>
</tr>
<tr>
<td>116, 117</td>
<td>Comm 20</td>
<td>d. Interpret billing statements</td>
</tr>
<tr>
<td>547, 194</td>
<td>S 60</td>
<td>e. Handle customer inquiries and complaints</td>
</tr>
<tr>
<td>280, 879</td>
<td>HR 28</td>
<td>f. Handle customer inquiries and complaints</td>
</tr>
<tr>
<td>117, 191</td>
<td>Comm 20</td>
<td>g. Interpret store policies for customers</td>
</tr>
<tr>
<td>117, 879</td>
<td>D 22</td>
<td>h. Answer customer request for displayed merchandise</td>
</tr>
<tr>
<td>117, 879</td>
<td>S 19</td>
<td>i. Handle merchandise returns</td>
</tr>
<tr>
<td>115</td>
<td>Comm 24</td>
<td>j. Know how to handle merchandise returns</td>
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CUSTOMER SERVICE

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<tr>
<td>134</td>
<td>Comm 23</td>
<td>a. Assist customer fill-out credit application forms</td>
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<tr>
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<td>PS 1</td>
<td>b. Know the procedures for obtaining a credit card</td>
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<td>O 21</td>
<td>c. Know how to interpret credit policies</td>
</tr>
<tr>
<td>918, 280</td>
<td>Comm 21</td>
<td>d. Interpret billing statements</td>
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<tr>
<td>116, 117</td>
<td>Comm 20</td>
<td>e. Handle customer inquiries and complaints</td>
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<td>S 60</td>
<td>f. Handle customer inquiries and complaints</td>
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<tr>
<td>280, 879</td>
<td>HR 28</td>
<td>g. Interpret store policies for customers</td>
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<tr>
<td>117, 191</td>
<td>Comm 20</td>
<td>h. Answer customer request for displayed merchandise</td>
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<td>117, 879</td>
<td>D 22</td>
<td>i. Handle merchandise returns</td>
</tr>
<tr>
<td>117, 879</td>
<td>S 19</td>
<td>j. Know how to handle merchandise returns</td>
</tr>
<tr>
<td>115</td>
<td>Comm 24</td>
<td>k. Handle telephone and mail orders</td>
</tr>
<tr>
<td>115</td>
<td>Comm 24</td>
<td>l. Handle telephone and mail orders</td>
</tr>
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</table>
# Psychomotor and Cognitive Skill Statements

## Salesperson/Sales Clerk

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<thead>
<tr>
<th>Competency Numbers</th>
<th>LAP Numbers</th>
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</thead>
<tbody>
<tr>
<td>114</td>
<td>Comm 9</td>
<td>a. Know how to handle telephone and mail orders</td>
</tr>
<tr>
<td>008</td>
<td>Adv 7</td>
<td>b. Know how to handle telephone and mail orders</td>
</tr>
<tr>
<td>359</td>
<td>Math 7</td>
<td>c. Compute postal and mail charges</td>
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<tr>
<td>887</td>
<td>S 18</td>
<td>Pack and/or wrap merchandise</td>
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<tr>
<td>552</td>
<td>PS 37</td>
<td>Pack and/or wrap merchandise</td>
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<tr>
<td>629</td>
<td>Mdse 32</td>
<td>a. Know wrapping/packaging methods</td>
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<tr>
<td>620</td>
<td>Mdse 29</td>
<td>b. Know gift wrapping services and charges</td>
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<tr>
<td>556</td>
<td>PS 25</td>
<td>Quote delivery dates and charges</td>
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<tr>
<td>503</td>
<td>PS 25</td>
<td>a. Know delivery area served by the store, delivery charges, and delivery schedules</td>
</tr>
<tr>
<td>833</td>
<td>S 20</td>
<td>b. Know delivery area served by the store, delivery charges, and delivery schedules</td>
</tr>
<tr>
<td>624</td>
<td>Mdse 31</td>
<td>c. Know types of delivery systems</td>
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<tr>
<td>363</td>
<td>Math 12</td>
<td>Compute alteration charges</td>
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<tr>
<td>825</td>
<td>S 54</td>
<td>a. Know how to handle sales requiring merchandise alterations</td>
</tr>
<tr>
<td>042</td>
<td>Adv 7</td>
<td>Inform customers of location and availability of advertised merchandise</td>
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<tr>
<td>003</td>
<td>Adv 7</td>
<td>a. Know the price, size, colors, styles, etc. of advertised merchandise</td>
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<tr>
<td>048</td>
<td>Adv 7</td>
<td>Inform customers of special in-store events/promotion</td>
</tr>
<tr>
<td>834</td>
<td>S 17</td>
<td>Explain store's policy concerning lay-away</td>
</tr>
<tr>
<td>831</td>
<td>S 17</td>
<td>a. Compute lay-away charges</td>
</tr>
<tr>
<td>363</td>
<td>Math 12</td>
<td>b. Compute lay-away charges</td>
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### STORE/DEPARTMENT OPERATIONS

<table>
<thead>
<tr>
<th>Competency Numbers</th>
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<tbody>
<tr>
<td>351</td>
<td>Math 16</td>
<td>Balance the cash register</td>
</tr>
<tr>
<td>389</td>
<td>Math 17</td>
<td>Balance the cash register</td>
</tr>
<tr>
<td>636</td>
<td>O 14</td>
<td>Prepare daily sales summary sheets</td>
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<tr>
<td>632</td>
<td>O 14</td>
<td>Close out the department</td>
</tr>
<tr>
<td>680</td>
<td>O 19</td>
<td>Receive and record customer payment of bills</td>
</tr>
<tr>
<td>600</td>
<td>O 19</td>
<td>a. Know how to receive and record customer payment of bills</td>
</tr>
<tr>
<td>595</td>
<td>O 19</td>
<td>b. Know billing procedures</td>
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### INVENTORY

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<tr>
<td>463</td>
<td>Mdse 26</td>
<td>Take physical inventory</td>
</tr>
<tr>
<td>442</td>
<td>Mdse 28</td>
<td>a. Take stock count for inventory</td>
</tr>
<tr>
<td>414</td>
<td>Mdse 27</td>
<td>b. Know how to take a stock count for physical inventory</td>
</tr>
<tr>
<td>401</td>
<td>Mdse 27</td>
<td>c. Know the purposes of stock counts</td>
</tr>
<tr>
<td>400</td>
<td>Mdse 3</td>
<td>d. Know the forms and records used in inventory control</td>
</tr>
<tr>
<td>Competency Numbers</td>
<td>LAP Numbers</td>
<td>Psychomotor and Cognitive Skill Statements</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------</td>
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<tr>
<td>837</td>
<td>S 25</td>
<td>Prepare stock for inventory</td>
</tr>
<tr>
<td>470</td>
<td>Mdse 5</td>
<td>Use ticket stubs and/or special forms to key records of merchandise sold</td>
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<tr>
<td>428</td>
<td>Mdse 5</td>
<td>a. Know how to use ticket stubs and/or forms for keeping records of merchandise sold</td>
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<tr>
<td>467</td>
<td>Mdse 31</td>
<td>Use unit inventory control information</td>
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<tr>
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<td>a. Know the uses of inventory control information</td>
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<tr>
<td>138</td>
<td>Comm 39</td>
<td>Assist in training other employees.</td>
</tr>
<tr>
<td>282</td>
<td>HR 58</td>
<td>Sponsor new employees</td>
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<tr>
<td>599</td>
<td>0 22</td>
<td>Recognize and handle shoplifters</td>
</tr>
<tr>
<td>651</td>
<td>0 22</td>
<td>a. Know how to recognize and handle shoplifters</td>
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<tr>
<td>660</td>
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<td>Handle employee or customer accidents</td>
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<tr>
<td>732</td>
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<td>Safely handle equipment</td>
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<td>615</td>
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<td>Use stocking safety procedures</td>
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<tr>
<td>710</td>
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<td>Operate price-marking machine</td>
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<td>a. Know how to operate price-marking equipment</td>
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<td>0 9</td>
<td>Put price tickets on merchandise</td>
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<tr>
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<td>a. Know how to put price tickets on merchandise</td>
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<tr>
<td>444</td>
<td>Mdse 40</td>
<td>Change prices on merchandise</td>
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<tr>
<td>406</td>
<td>Mdse 40</td>
<td>a. Know methods and procedures for changing prices</td>
</tr>
<tr>
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<td>b. Know procedures for recording price changes</td>
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<td>Mdse 38</td>
<td>Know the store's price-line structure and pricing policies</td>
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<td>364</td>
<td>Math 27</td>
<td>Calculate markup percent for merchandise</td>
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<tr>
<td>838</td>
<td>S 24</td>
<td>Stock merchandise</td>
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<td>PS 19</td>
<td>a. Know how to stock merchandise</td>
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<tr>
<td>840</td>
<td>S 23</td>
<td>b. Know how to perform housekeeping activities concerning stock</td>
</tr>
<tr>
<td>908</td>
<td>S 25</td>
<td>c. Rotate stock</td>
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### Psychomotor and Cognitive Skill Statements

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<td>Transfer stock</td>
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<td>445</td>
<td>Mdse 3</td>
<td>a. Record transfer of stock</td>
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<td>Mdse 30</td>
<td>b. Know procedures for recording transfer of stock</td>
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<td>Use stockkeeping forms and reports</td>
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<tr>
<td>878</td>
<td>S 26</td>
<td>Locate and refill low stock items (reserve or under stock)</td>
</tr>
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</table>

**STORAGE**

<table>
<thead>
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<th>Competency Numbers</th>
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<th>Psychomotor and Cognitive Skill Statements</th>
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<tr>
<td>648</td>
<td>0 10</td>
<td>Know the various types of merchandise storage</td>
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**RECEIVING PROCEDURES**

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<th>LAP Numbers</th>
<th>Psychomotor and Cognitive Skill Statements</th>
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<td>Check-in merchandise against the invoice</td>
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<td>a. Know procedures for checking-in merchandise against the invoice</td>
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<td>701</td>
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<td>Determine shipping and receiving discrepancies</td>
</tr>
<tr>
<td>334</td>
<td>0 11</td>
<td>Report and handle damaged merchandise</td>
</tr>
<tr>
<td>700</td>
<td>0 7</td>
<td>Wrap or package merchandise for return to vendor</td>
</tr>
<tr>
<td>647</td>
<td>0 5</td>
<td>Know receiving terminology</td>
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**ORDER MERCHANDISE**

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<th>Psychomotor and Cognitive Skill Statements</th>
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<tr>
<td>442</td>
<td>Mdse 28</td>
<td>Count stock for reorder</td>
</tr>
<tr>
<td>433</td>
<td>Mdse 9</td>
<td>Place orders of merchandise</td>
</tr>
<tr>
<td>430</td>
<td>Mdse 19</td>
<td>a. Know procedures for ordering merchandise</td>
</tr>
<tr>
<td>439</td>
<td>Mdse 19</td>
<td>b. Prepare merchandise order forms</td>
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</tbody>
</table>
RETAILING OCCUPATION REFERENCES


