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Before you begin

This learner guide is based on the unit of competency *TLIA3015 Complete receipt/despatch documentation*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

Your trainer will advise which parts of the learner guide you need to read, and which activities you need to complete. This learner guide will help you in your training.

Icon	Feature	How you can use each feature
	Learning content	Read each topic. Speak to your trainer if you need help.
	Activities	Activities give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which activities to complete.
	Video clips	Where you see a QR code, you can use a smartphone or tablet to access video clips about the content. For information about how to download an app that will read the QR code, or for more help, visit our website: www.aspirelr.com.au/help
	Workplace examples	Workplace examples at the end of each topic show how your learning applies in practice.
	Summaries	Key learning points are provided at the end of each topic.
	Words to remember	As you read the learner guide, use the table at the back of the book to write down any words you need to remember. There is a space for you to write the word and a space for you to write down what the word means. You can also access a full glossary of terms via this QR code.





Topic 1 | What you need to know to complete receiptal/despatch documentation

The first part of the receiptal/despatch process starts when an order is received. The order describes exactly what the customer wants. It is then a matter of getting the goods together and despatching them to the customer.

A series of things that need to happen to ensure the customer actually gets what they ordered. Staff must first be clear on what goods are needed and where in the warehouse those goods are stored. Obtaining this information requires documentation to be interpreted, and the relevant regulations and specifications to be understood and followed.

Staff should follow and apply the workplace procedures, relevant regulations and codes of practice. They should use their product knowledge to work out what documentation needs to be completed when receiving and despatching goods.

In this topic you will learn about:

1A Work requirements to complete orders

1B Documentation processes



Activity 1

Question 1

Draw a line from the beginning of the sentence on the left to match the end of the sentence on the right.

- | | |
|--|---|
| * To complete documentation in relation to health and safety, you must follow | * the relevant code. |
| * To complete documentation in relation to pallet racking, you must follow | * the relevant legislation in your state/territory. |
| * To complete documentation in relation to working in confined spaces, you must follow | * the relevant standard. |

Question 2

Which of the following sentences apply to the documentation requirements to complete orders? Tick all that apply.

- Testing the knowledge of workers on the laws affecting a warehouse
- Following environmental protection guidelines, such as the use and disposal of chemicals
- Trialling new procedures to increase efficiency
- Following standards for checking and inspecting imported goods
- Maintaining equipment and areas of a warehouse as a part of housekeeping standards

Question 3

Circle the correct word to complete the sentence.

- A site layout shows where
- * emergencies take place
 - * activities take place

The work system to complete receipt/despatch documentation may be done in the following order:

Step 1

Order request documentation is interpreted.

Step 2

Workplace procedures for order documentation are identified.

Step 3

Product/s in order are noted and workplace location/s are identified.

Step 4

Workplace and product knowledge is used to organise documentation.

Step 5

Required schedules for order movement are identified and noted.

Step 6

Special aspects of the order, such as dangerous/hazardous materials or temperature-controlled goods are identified.

Step 7

Information on documentation procedures and relevant regulatory requirements is interpreted.

Step 8

Order is checked against schedule and order form.

Step 9

Workplace records are completed, and labels and appropriate documentation are attached in accordance with workplace procedures and relevant regulatory requirements.

Step 10

Special transportation requirements are identified and conveyed to appropriate personnel.

Step 11

Required documentation for dangerous goods and hazardous materials is completed in accordance with relevant regulations and the current Australian Dangerous Goods Code, as required.

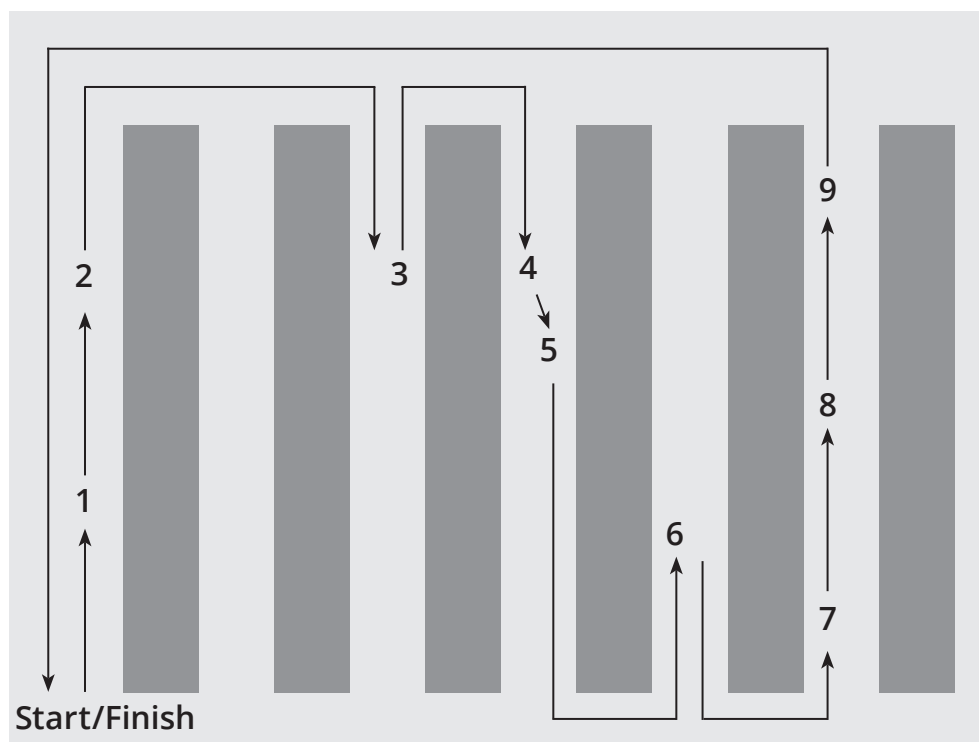
Workplace knowledge to organise documentation

Having knowledge of the workplace and products makes it easier to organise documentation processes.

In a busy warehouse where there are many orders to be picked, the orders should first be examined and analysed before starting the work. The picking order documentation can be prepared so that stock is picked for multiple orders, instead of going back and forth. This way, efficiency is increased as it saves time, energy and the use of equipment.

For example, when a pallet needs to be stacked to complete a customer's order, it is better to locate the required products and identify the most efficient route around the warehouse to gather the stock. The size and weight of the products required would also need to be considered; the larger, heavier items should be stacked on the bottom of the pallet with lighter items on top.

Having a plan and organising the documentation to reflect the plan is a more effective way to work. Look at this diagram of an order process for a section of a warehouse.



Imagine that the numbers shown in the diagram are for three different orders.

Order 1: numbers 1, 3 and 6

Order 2: numbers 2, 4, 5 and 9

Order 3: numbers 7 and 8

Getting each order individually would mean a lot of backtracking up and down the aisles of the warehouse, whereas planning it all first means that the quickest and easiest way can be organised.

Large organisations might have people whose work role it is to do this kind of planning. Some workplaces have computer systems that work out the most effective method.



Read the following workplace example to see how the concepts you have learned are applied in a real-life situation.

Workplace example for Topic 1

Yuri is a distribution supervisor for Manufacturing Warehouse Supplies (MWS), and has been asked to have a look at how his organisation arranges its receiptal/despatch documentation. The company he works for stores and distributes fresh, frozen and dry goods, as well as some cleaning chemicals. These products come from local and interstate suppliers, with trucks arriving at any time during the day.

The majority of MWS's customers are in the local hospitality industry. These clients expect the right products at the right time to meet their own customer requirements, so it is vital that Yuri and the receiptal/despatch team get their processes right. The company prides itself on providing good customer service. MWS has recently taken over a small competitor who provided fresh vegetable products to the same client group. As the company continues to grow, new staff are employed.

Yuri is aware that things are working quite well; he also realises most of what people know about products and procedures isn't written down, but is stored in people's heads. Yuri understands that well-written workplace procedures enable everyone to provide consistent results and gives them a good basis for making further improvements.

Yuri organises a team meeting to get the staff to write down what they do in their job. These drafts are then reviewed and worked into workplace procedures.

Once the procedures are written, Yuri asks team leaders to follow the processes and they work in practice on the warehouse floor. The team leaders take two orders that are due to go out that week and have staff follow the written documentation to see whether what was written down actually happens.



2A | Follow order processes

To complete documentation correctly and accurately, the workplace procedures and the relevant legislation must be followed.

This means knowing how to read and interpret information from instructions, labels and procedures. Part of the receival and despatch process involves estimating the size and special requirements for the goods and loads. This is particularly important when dealing with dangerous goods and hazardous materials. Important information must be shared to make sure the correct ways of handling, storing and transporting these goods are followed. There will be additional documentation requirements for dangerous goods and hazardous materials.

Follow workplace procedures

Workplace procedures are steps in a process that have been trialled and are known to improve efficiency.

The procedure for an order can include a checklist that must be completed as part of the receival/despatch process. There may be information on where the documentation is kept, how to access it, who needs it and how it is stored.

For example, a procedure may describe the requirements for handling particular goods. Some goods are easy to despatch, while others (such as milk) require refrigerated transport. If chemicals make up the order, a safety data sheet (SDS) may need to be sent with the order. This information must be described in workplace procedures.

Depending on the workplace, such a procedure might outline information such as:

- why certain actions need to be carried out
- who should carry out certain actions as part of the process
- what equipment might be required to do the tasks
- how and when the tasks should be done
- what other documentation might need to be considered.



Specialist transportation experts

If special transportation is required, it might be outsourced to specialists who handle the whole process. For goods that are received or despatched regularly, the receipt and despatch procedures will outline the transport and paperwork requirements.

Transportation

The transport operators need to know what they are transporting so they can arrange the correct transport equipment. This includes ensuring the truck has:

- the right capacity (size, weight, and security)
- the correct methods of securing the load
- the equipment needed to load and unload what needs to be transported.

Part of the arrangement will be working out what routes need to be taken. Certain roads are designated over-dimension (OD) routes and these must be used by trucks carrying OD loads.

Security issues

Distribution of high-value goods, such as money, jewellery, liquor and cigarettes, requires transportation that makes sure goods are kept secure. As terrorism becomes more of a problem, some goods (such as certain chemicals) can only be distributed in small quantities or under special circumstances, perhaps with special arrangements required for storage and handling.

Receipt arrangements

The parties receiving the goods need to know ahead of time what is coming so they can plan ahead with handling and storage at their end.

Work to a schedule

A warehouse is likely to work within tight schedules and deadlines.

Anything that interrupts the workflow can have an effect and consequences in other work areas. Monitoring and prioritising your own work activities means being aware of the schedule and thinking about the best and most efficient way to complete tasks in order to meet deadlines.

Working to a planned schedule means keeping in mind that your tasks and the time taken to complete them can have an effect on the work of others. This may mean using a checklist or a schedule to complete tasks so that no steps are missed or overlooked. Overlooking details can damage the goods you are working with, or can cause an injury or incident if there is a rush and WHS is overlooked.

For example, people working in the unloading bay need the documentation that gives information to stay safe when working with hazardous goods.

Watch this video [00m:42s] to learn about how to work systematically to a schedule.





Summary of Topic 2

1. To complete documentation correctly, the workplace procedures and the relevant legislation must be followed.
2. Workplace procedures are steps in a process that have been trialled and known to improve efficiency.
3. The size and shape of goods and loads will determine the work processes and documentation required.
4. Dangerous goods and hazardous materials are in a separate, regulated class for storage, handling and distribution.
5. Checking the goods ensures the order is correct before delivery.
6. Workplace procedures and regulatory requirements determine the documentation to be attached to goods.
7. While most products can be transported by standard vehicles, some goods require specialised transportation.
8. Communication between despatch and receipt is important when goods have special transportation requirements.
9. Monitoring and prioritising your own work activities means being aware of the schedule and thinking about the best and most efficient way to do things to meet deadlines.
10. To work systematically means to follow a procedure or a work instruction in the correct order.