

UBT208X

Process payment for beauty purchases

Unit reference number: M/615/0795

Level: 2

Guided Learning (GL) hours: 20

Overview

This unit will enable learners to provide retail services for customers. Learners will develop the knowledge and communication skills to enable them to take payment for beauty purchases in a polite, friendly manner. Learners will develop their understanding of the effects behaviour and presentation can have on the retail sales experience, whilst developing their knowledge and skills required to resolve pricing problems.

Learning outcomes

On completion of this unit, learners will:

LO1 Know how to process payment for purchases in a retail environment

LO2 Be able to process payment for purchases in a retail environment

Assessment requirements

Learners must produce a portfolio of evidence which includes:

1. Service portfolio
2. Summative practical assessment

1. Service portfolio

Learners must produce a services portfolio. The service portfolio must contain evidence that learners have:

- Taken all types of payment for purchases
 - Cash payments
 - Credit/debit card payments
 - Gift voucher payments

The portfolio must be completed prior to learners undertaking the one summative practical assessment.

Evidence from the one summative practical assessment must also be presented in the portfolio.

2. Summative practical assessment

Learners must carry out a complete retail service which will be observed, marked and graded by centre assessors.

The practical assessment must take place in a real or realistic working environment on a real client. At a minimum the practical assessment for this unit must cover:

- Process payment – complete the processing of a payment for beauty purchases in a retail environment. Take payment for a minimum of one item or one service, completing the transaction from start to finish

Recorded professional discussion can also be used as an assessment method attached to the practical assessment and is particularly useful for gathering evidence for criteria related to evaluation and reflection. Professional discussions should be planned and recorded.

Unit content

LO1 Know how to process payment for purchases in a retail environment

Describe how to resolve pricing problems:

- Referring to reliable pricing information such as online pricing guide from head office
- Seeking advice from the person who can provide clarification when pricing information is unclear or unavailable, for example account manager or department manager, senior therapist/salon owner

Identify the pricing structure and understand how and when offers can affect this:

- Informing customers of the correct amount to pay, taking account of any special offers or discounts that apply

Explain how to process payments in line with organisational procedures, where the payment is acceptable:

- Cash payment – checking cash and giving correct change
- Credit/debit card payments – checking signatures, allowing access to the card machine
- Loyalty point payment – check eligibility for the purchase intended
- Gift card payment – check currency and dates of card for eligibility
- Receipts given, customer copy and organisation copy recorded as per establishment procedure. Till processing electronic and computer generated

Describe how and when additional services should be offered to the customer:

- Understand the importance of link selling and the possibility of further sales by offering further assistance and greater advice of additional products and services
- If payment is for services provided, offer to rebook for next treatment demonstrating awareness by promoting any special offers. Starting a dialogue with the customer will allow for accurate prescription of samples for the customer to try to enhance future retail opportunities

Explain how to treat customers politely throughout the payment process:

- Salon procedure and protocols are adhered to at all times. Customer greeted with good eye contact, a smile and a polite greeting
- Customer must be treated with politeness – saying “hello”, “good morning/afternoon” and “thank you” are all part of good customer service; using good manners is appropriate whether the customer makes a purchase or not
- Respect and courtesy should be applied at all stages of the transaction. An understanding of the need to ensure professional courtesy at all times
- Professionalism – all customers should be treated professionally, which means the use of competence or skill expected of the professional. Professionalism shows the customer they are cared for

Describe the importance of acknowledging other customers who are waiting to pay or to be helped in some other way:

- Understand the importance of making all customers feel valued and that their custom is valued. A signal such as eye contact and a smile can sometimes be all it takes. Understanding when to engage in a comment such as “I shan’t keep you long” but not making the present customer feel rushed or undervalued
- Understanding the value of promptness in customer service – promises for delivery of products must be on time. Delays and cancellations of products should be avoided

Describe how to explain to customers tactfully that payment has not been approved:

- Keep it quiet – having a credit card denied can be embarrassing for the customer. Ensure you make them feel as comfortable as possible. Do not broadcast the news. The rest of the queue does not need to know that the customer's credit card has been declined. Say it quietly enough so that just you and the customer hear it, preventing further embarrassment
- Do not go into detail – when you inform a customer that his or her card has been declined, they will probably ask why. They may get defiant and want you to know they have enough funds to pay for the transaction. You do not need to go into detail. In fact, you will not even know why the card was declined, so let the customer know that. Tell them they should call their bank or credit card company to sort everything out
- Ask the customer which other method of payment they'd like to use – ask the customer "What other form of payment would you like to use?" this shows them that you still have confidence in them, and it can be helpful in saving the transaction for your business. If they do not have another way to pay, do not make a big deal out of it. Ask them if they would like you to hold their purchase. If not, just put it away quietly

LO2 Be able to process payment for purchases in a retail environment

Greet customers in a polite and friendly manner:

- Polite, courteous, respectful, speaking clearly, concisely and friendly manner. Treating customers politely throughout the payment process

Advise customers on the correct payment:

- Tell customers the correct amount to pay, taking account of any special offers or discounts that apply

Use secure payment handling techniques:

- Cash payments are taken in an appropriate manner; individual notes and coins are checked in line with establishment rules and guidelines. Clearly instruct the customer the amount payable. The amount paid is checked and the correct change calculated and given. The receipt is provided along with the purchase
- Credit/debit card payments are taken in an appropriate manner: the payment is authorised in line with establishment rules and guidelines. Chip and pin – clearly inform the customer the of amount that is payable, once payment is sent to the terminal, ask the customer to insert their card into the terminal, check the amount and enter the PIN number. The customer receipt is provided along with the purchase and the organisation copy is stored in line with company procedure
- Touch card payments are taken in an appropriate manner – the payment is authorised in line with establishment rules and guidelines. Clearly instruct the customer the amount payable, once payment is sent to the terminal instruct the customer to touch their card against the terminal. The receipt is provided along with the purchase
- Check payments are taken in an appropriate manner – signatures are checked and correct procedures are taken
- Gift voucher payments are taken in an appropriate manner and correct procedures are followed. Clearly instruct the customer the amount payable – check the amount payable matches against the credit on the voucher and that the voucher is for the establishment and is still within date. Change for payment must be in line with establishment guidelines (another voucher instead of a cash payment)
- In all cases customer loyalty schemes are adhered to with appropriate rewards given

Complete the transaction and thank the customer:

- Customer is thanked for their custom and the transaction is finalised in an appropriate manner

Assessment criteria

In order to pass this unit, learners must achieve all pass criteria. The pass criteria relate to the proficient demonstration of skills and knowledge.

Learning outcome The learner must:	Pass The learner can:
LO1 Know how to process payment for purchases in a retail environment	P1 Describe how to resolve pricing problems
	P2 Identify the pricing structure and understand how and when offers can effect this
	P3 Explain how to process payments in line with organisational procedures, where the payment is acceptable
	P4 Describe how and when additional services should be offered to the customer
	P5 Explain how to treat customers politely throughout the payment process
	P6 Describe the importance of acknowledging other customers who are waiting to pay or to be helped in some other way
	P7 Describe how to explain to customers tactfully that payment has not been approved
LO2 Be able to process payment for purchases in a retail environment	P8 Greet customers in a polite and friendly manner
	P9 Advise customers on the correct payment
	P10 Use secure payment handling techniques
	P11 Complete the transaction and thank the customer

Assessment guidance

Assessors must use the amplified assessment guidance in this section to judge whether assessment criteria have been achieved in the practical assessment.

P8 Greet customers in a polite and friendly manner

Learners must use appropriate greetings when talking to customers. Learners must smile and stop what they are doing to properly acknowledge the customer. The customer should be greeted within 30 seconds of the learner becoming aware of them. The learner must adopt a polite, friendly and professional manner. The learner should ask questions to ascertain the customers' needs. The learner should be dressed professionally as a representative of the company/establishment the learners needs to portray a professional capable image.

P9 Advise customers on the correct payment

Learners must communicate the amount of the transaction in a clear and concise manner, ensuring any special offers are taken into consideration. Learners must enquire what payment method is preferred and they must check for understanding whilst politely waiting for payment to be made.

P10 Use secure payment handling techniques

The payment must be taken in line with organisation procedure

Learners will ensure that cash payments are taken in an appropriate manner; individual notes and coins are checked in line with establishment rules and guidelines. Learners will clearly instruct the customer of the amount payable the offered payment is checked and the correct change calculated and given. The receipt is provided along with the purchase.

Learners will ensure that credit/debit card payments are taken in an appropriate manner and that the payment is authorised in line with establishment rules and guidelines. Chip and pin – learners will clearly instruct the customer the amount payable, once payment is sent to the terminal, learners will ask the customer to insert their card into the terminal, check the amount and enter the PIN number. The customer receipt is provided along with the purchase and the organisation copy is stored in line with company procedure.

Learners will ensure 'touch' card payments are taken in an appropriate manner: the payment is authorised in line with establishment rules and guidelines. Learners will clearly instruct the customer the amount payable, once payment is sent to the terminal, learners will instruct the customer to touch their card against the terminal. The receipt is provided along with the purchase. Learners will ensure check payments are taken in an appropriate manner; signatures are checked and correct procedures are taken.

Learners will ensure gift voucher payments are taken in an appropriate manner and correct procedures are followed. Learners will clearly instruct the customer the amount payable – check the amount payable matches against the credit on the voucher and that the voucher is for the establishment and is still within date. Any differences in the amount required and the voucher value will be calculated and payment adjustments made in compensation.

Learners must ensure change for payment must be in line with establishment guidelines (another voucher instead of a cash payment may be offered as standard). Customer loyalty schemes are adhered to with appropriate rewards given in line will all payment transactions regardless of the methods used. In all cases the learner will take payment in a professional, polite and friendly nature.

P11 Complete the transaction and thank the customer

Learners must ensure customers are thanked for their custom and the transaction is finalised in an appropriate manner.

Resources

The special resources required for this unit are access to a real or realistic working environment which has access to a good stock of retail products which supports the provision of a retail service.

Delivery guidance

Teachers are encouraged to use innovative, practical and engaging delivery methods to enhance the learning experience. Learners may benefit from:

- Meaningful employer engagement so they relate what is being learned to the real world of work and understand commercial competency and retail opportunities of products
- Work experience within a commercial retail environment so they can practise to hone their skills in a real environment
- Using interactive information and technology, systems and hardware so they can learn about concepts and theories; research current trends; research product knowledge and produce commercial aids

Links with other units

This unit is closely linked with the following units:

UCO34M Health, safety and hygiene

The health and safety unit will provide knowledge and understanding of the responsibilities for health and safety as defined by any specific legislation covering the role of a professional therapist. This unit greatly underpins all practical unit delivery.

UBT205M Consultation and record keeping

Client consultation is an effective and necessary tool for the beauty consultant to help establish the unique needs and requirements of the customer so they can recommend the most appropriate products and provide the best advice. Effective record keeping will allow the consultant to keep the customer informed of any offers or promotions and will inform any future campaigns as to the specific needs and requirements of the customer, making marketing more effective. The consultation and record keeping unit underpins all technical units within this qualification and should be delivered prior to any technical beauty therapy unit.

UBT207M Display stock to promote beauty sales

This unit additionally underpins the other units within the nail technologies qualification by introducing the learner to the reasons for and the methods of creating eye-catching displays using promotional materials, equipment and stock from the concession/salon. The knowledge of this unit will allow learners to plan, preparation and maintenance a display assisting with promoting additional products or services of the concession/salon.

UBT203M Promote and encourage beauty retail sales

Knowledge of how to identify products and inform the customer of the features and benefits of the products to ensure that they meet their needs. Improving customer service and gaining commitment from the customer to use professional products as well as maintaining the results from the recommended products. It will enable learners to make clear, informed selections and recommendations for product use