

# National Occupational Analysis

# Partsperson

# 2015

**CANADIAN  
STANDARD  
OF EXCELLENCE  
FOR SKILLED TRADES**



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**Canada** 

## Partsperson

**2015**

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*The Canadian Council of Directors of Apprenticeship (CCDA) recognizes this National Occupational Analysis (NOA) as the national standard for the occupation of Partsperson.*

## **Background**

The first National Conference on Apprenticeship in Trades and Industries, held in Ottawa in 1952, recommended that the federal government be requested to cooperate with provincial and territorial apprenticeship committees and officials in preparing analyses of a number of skilled occupations. Employment and Social Development Canada (ESDC) sponsors a program, under the guidance of the CCDA, to develop a series of NOAs.

The NOAs have the following objectives:

- to describe and group the tasks performed by skilled workers;
- to identify which tasks are performed in every province and territory;
- to develop instruments for use in the preparation of Interprovincial Red Seal Examinations and curricula for training leading to the certification of skilled workers;
- to facilitate the mobility of apprentices and skilled workers in Canada; and,
- to supply employers, employees, associations, industries, training institutions and governments with analyses of occupations.

## ACKNOWLEDGEMENTS

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## TABLE OF CONTENTS

FOREWORD	I
ACKNOWLEDGEMENTS	II
TABLE OF CONTENTS	III
STRUCTURE OF ANALYSIS	V
DEVELOPMENT AND VALIDATION OF ANALYSIS	VII

### ANALYSIS

SAFETY	3
SCOPE OF THE PARTSPERSON TRADE	4
OCCUPATIONAL OBSERVATIONS	6
ESSENTIAL SKILLS SUMMARY	7

#### **BLOCK A**            **COMMON OCCUPATIONAL SKILLS**

Task 1	Performs safety-related functions.	9
Task 2	Uses tools and equipment.	11
Task 3	Organizes work.	16
Task 4	Communicates with others.	17

#### **BLOCK B**            **CUSTOMER SERVICE**

Task 5	Provides services to retail customers.	20
Task 6	Provides services to wholesale customers.	22
Task 7	Provides services to internal customers.	24
Task 8	Provides general customer service and support.	25

<b>BLOCK C</b>	<b>PARTS ACQUISITION</b>	
	Task 9	Identifies parts. 29
	Task 10	Sources parts. 31
<b>BLOCK D</b>	<b>WAREHOUSING AND INVENTORY</b>	
	Task 11	Handles parts and materials. 34
	Task 12	Performs inventory control. 37
	Task 13	Performs shipping and receiving duties. 40
<b>BLOCK E</b>	<b>BUSINESS PRACTICES</b>	
	Task 14	Promotes products and services. 43
	Task 15	Implements pricing formula. 46
	Task 16	Processes financial transactions. 47
<b>APPENDICES</b>		
<b>APPENDIX A</b>	<b>TOOLS AND EQUIPMENT</b>	53
<b>APPENDIX B</b>	<b>GLOSSARY</b>	55
<b>APPENDIX C</b>	<b>ACRONYMS</b>	57
<b>APPENDIX D</b>	<b>BLOCK AND TASK WEIGHTING</b>	58
<b>APPENDIX E</b>	<b>PIE CHART</b>	62
<b>APPENDIX F</b>	<b>TASK PROFILE CHART</b>	63

## STRUCTURE OF ANALYSIS

To facilitate understanding of the occupation, the work performed by tradespersons is divided into the following categories:

<b>Blocks</b>	the largest division within the analysis that is comprised of a distinct set of trade activities
<b>Tasks</b>	distinct actions that describe the activities within a block
<b>Sub-Tasks</b>	distinct actions that describe the activities within a task
<b>Key Competencies</b>	activities that a person should be able to do in order to be called 'competent' in the trade

The analysis also provides the following information:

<b>Trends</b>	changes identified that impact or will impact the trade including work practices, technological advances, and new materials and equipment
<b>Related Components</b>	a list of products, items, materials and other elements relevant to the block
<b>Tools and Equipment</b>	categories of tools and equipment used to perform all tasks in the block; these tools and equipment are listed in Appendix A
<b>Context</b>	information to clarify the intent and meaning of tasks
<b>Required Knowledge</b>	the elements of knowledge that an individual must acquire to adequately perform a task



The appendices located at the end of the analysis are described as follows:

<b>Appendix A — Tools and Equipment</b>	a non-exhaustive list of tools and equipment used in this trade
<b>Appendix B — Glossary</b>	definitions or explanations of selected technical terms used in the analysis
<b>Appendix C — Acronyms</b>	a list of acronyms used in the analysis with their full name
<b>Appendix D — Block and Task Weighting</b>	the block and task percentages submitted by each jurisdiction, and the national averages of these percentages; these national averages determine the number of questions for each block and task in the Interprovincial exam
<b>Appendix E — Pie Chart</b>	a graph which depicts the national percentages of exam questions assigned to blocks
<b>Appendix F — Task Profile Chart</b>	a chart which outlines graphically the blocks, tasks and sub-tasks of this analysis

## DEVELOPMENT AND VALIDATION OF ANALYSIS

### Development of Analysis

A draft analysis is developed by a committee of industry experts in the field led by a team of facilitators from ESDC. This draft analysis breaks down all the tasks performed in the occupation and describes the knowledge and abilities required for a tradesperson to demonstrate competence in the trade.

### Draft Review

The NOA development team then forwards a copy of the analysis and its translation to provincial and territorial authorities for a review of its content and structure. Their recommendations are assessed and incorporated into the analysis.

### Validation and Weighting

The analysis is sent to all provinces and territories for validation and weighting. Participating jurisdictions consult with industry to validate and weight the document, examining the blocks, tasks and sub-tasks of the analysis as follows:

<b>BLOCKS</b>	Each jurisdiction assigns a percentage of questions to each block for an examination that would cover the entire trade.
<b>TASKS</b>	Each jurisdiction assigns a percentage of exam questions to each task within a block.
<b>SUB-TASKS</b>	Each jurisdiction indicates, with a YES or NO, whether or not each sub-task is performed by skilled workers within the occupation in its jurisdiction.

The results of this exercise are submitted to the NOA development team who then analyzes the data and incorporates it into the document. The NOA provides the individual jurisdictional validation results as well as the national averages of all responses. The national averages for block and task weighting guide the Interprovincial Red Seal Examination plan for the trade.

This method for the validation of the NOA also identifies common core sub-tasks across Canada for the occupation. If at least 70% of the responding jurisdictions perform a sub-task, it shall be considered common core. Interprovincial Red Seal Examinations are based on the common core sub-tasks identified through this validation process.

## **Definitions for Validation and Weighting**

<b>YES</b>	sub-task performed by qualified workers in the occupation in a specific jurisdiction
<b>NO</b>	sub-task not performed by qualified workers in the occupation in a specific jurisdiction
<b>NV</b>	analysis <u>N</u> ot <u>V</u> alidated by a province/territory
<b>ND</b>	trade <u>N</u> ot <u>D</u> esignated in a province/territory
<b>NOT COMMON CORE (NCC)</b>	sub-task, task or block performed by less than 70% of responding jurisdictions; these will not be tested by the Interprovincial Red Seal Examination for the trade
<b>NATIONAL AVERAGE %</b>	average percentage of questions assigned to each block and task in Interprovincial Red Seal Examination for the trade

## **Provincial/Territorial Abbreviations**

<b>NL</b>	Newfoundland and Labrador
<b>NS</b>	Nova Scotia
<b>PE</b>	Prince Edward Island
<b>NB</b>	New Brunswick
<b>QC</b>	Quebec
<b>ON</b>	Ontario
<b>MB</b>	Manitoba
<b>SK</b>	Saskatchewan
<b>AB</b>	Alberta
<b>BC</b>	British Columbia
<b>NT</b>	Northwest Territories
<b>YT</b>	Yukon Territory
<b>NU</b>	Nunavut

## **ANALYSIS**



Safe working procedures and conditions, accident prevention, and the preservation of health are of primary importance to industry in Canada. These responsibilities are shared and require the joint efforts of government, employers and employees. It is imperative that all parties become aware of circumstances that may lead to injury or harm. Safe learning experiences and work environments can be created by controlling the variables and behaviours that may contribute to accidents or injury.

It is generally recognized that safety-conscious attitudes and work practices contribute to a healthy, safe and accident-free work environment.

It is imperative to apply and be familiar with the Occupational Health and Safety (OH&S) Acts, Workplace Hazardous Materials Information System (WHMIS) and Transportation of Dangerous Goods (TDG) regulations. As well, it is essential to determine workplace hazards and take measures to protect oneself, co-workers, the public and the environment.

Safety education is an integral part of training in all jurisdictions. As safety is an imperative part of all trades, it is assumed and therefore it is not included as a qualifier of any activities. However, the technical safety tasks and sub-tasks specific to the trade are included in this analysis.

## SCOPE OF THE PARTSPERSON TRADE

“Partsperson” is this trade’s official Red Seal occupational title approved by the CCDA. This analysis covers tasks performed by partspersons whose occupational title has been identified by some provinces and territories of Canada under the following names:

	NL	NS	PE	NB	QC	ON	MB	SK	AB	BC	NT	YT	NU
Parts Technician						✓			✓				
Parts Technician - Parts											✓		
Partsperson	✓	✓	✓	✓	✓		✓	✓				✓	✓
Partsperson Level 3										✓			

Partspersons perform ordering, warehousing, inventory control and sales of parts. Their duties also include identifying parts and equipment, searching for parts, shipping and receiving parts, providing customer service and advice, and maintaining records.

The partsperson trade services a range of industries including motive power, appliance, heavy duty equipment and natural resources. For example, partspersons work in areas such as automotive service, commercial transport, small engine repair, aeronautics, agricultural equipment, marine equipment, electrical warehousing, plumbing and heating warehousing, refrigeration, stores facilities, tool cribs and parts recycling. They may work at either wholesale or retail levels or with end users. They may work with a broad range of aftermarket parts or on a more narrow scale, supplying parts for a particular make of vehicle or product. The work environment for partspersons is generally indoors in a warehouse and at a service counter. Some partspeople may perform or arrange deliveries of parts to their customers. Partspersons generally work in teams that include service staff, sales staff and service technicians.

Although the activities performed by a partsperson are similar for all industries in which they work, the product knowledge required is dramatically different. Therefore, they require an up-to-date knowledge of the industry as well as technical knowledge and the ability to describe parts and their applications to customers. It should be noted however, that the scope of this trade does not include the ability to apply this knowledge to diagnosing or repairing mechanical, electronic or other types of problems.

The computer and parts catalogues, both written and electronic, are the most important tools for the partsperson. Databases, online catalogues, inventory control systems, and digital media are necessary for ordering and organizing parts and for retrieving information. Extensive use of electronic catalogues requires partspersons to be precise in the use of terminology within specific industry sectors in order to locate correct parts in the catalogues.

As with all trades, safety is important to partspersons. Hazards include operating large equipment such as lift trucks and handling hazardous materials.

Key attributes for people entering this trade are: excellent interpersonal and customer service skills, computer application skills, problem solving skills, mathematical skills, manual dexterity and mechanical aptitude. Physical considerations for this occupation include a considerable amount of time standing, walking and lifting. This trade appeals to service-oriented people. This career offers stable employment not highly affected by seasonal employment trends.

Experienced partspersons may move into other positions such as sales representative, purchasing representative, parts department manager, store manager or store owner.



## **OCCUPATIONAL OBSERVATIONS**

Well-developed computer skills are a necessity for partspersons today. Technological advances continue to be made in the areas of computerized inventory control, online parts catalogues (web applications), online ordering (e-commerce) and wireless tracking devices. These applications have increased in functionality and have become more user-friendly. Technological advances have greatly facilitated the sharing of information to the point where it is virtually instantaneous.

The enforcement of safety regulations has become standard practice throughout the industry. Environmental regulations and zoning bylaws have become more stringent and are being enforced in the areas of storage, transportation and disposal of hazardous or dangerous goods. Partspersons must continue to be resourceful in meeting the obligations and challenges presented by these regulations and bylaws.

Training and continuous technical upgrading are necessary for partspersons to keep up-to-date on new products and technology as well as to address legislative safety and environmental requirements. Training is offered either online, on-site or through video conferencing.

## ESSENTIAL SKILLS SUMMARY

Essential skills are needed for work, learning and life. They provide the foundation for learning all other skills and enable people to evolve with their jobs and adapt to workplace change.

Through extensive research, the Government of Canada and other national and international agencies have identified and validated nine essential skills. These skills are used in nearly every occupation and throughout daily life in different ways.

A series of CCDA-endorsed tools have been developed to support apprentices in their training and to be better prepared for a career in the trades. The tools can be used independently or with the assistance of a tradesperson, trainer, employer, teacher or mentor to:

- understand how essential skills are used in the trades;
- learn about individual essential skills strengths and areas for improvement; and
- improve essential skills and increase success in an apprenticeship program.

Tools are available online or for order at: <http://www.esdc.gc.ca/eng/jobs/les/tools/index.shtml>.

The application of these skills may be described throughout this document within the competency statements which support each subtask of the trade. The following are summaries of the requirements in each of the essential skills, taken from the essential skills profile. A link to the complete essential skills profile can be found at [www.red-seal.ca](http://www.red-seal.ca).

### *Reading*

Partspersons read a variety of material including manufacturers' catalogues, service bulletins and manufacturers' warranties to provide information to customers on products.

### *Document Use*

Partspersons cross-reference inventory lists, bills of lading and packing slips to determine if parts are in stock and to verify that all parts ordered have been received. Partspersons refer to catalogues and reference materials to locate part numbers, costs, availabilities and specifications. They also use specification tables to determine operating capacities and specifications for a variety of products.

### *Writing*

Partspersons complete purchase orders, invoices, shipping forms, repair estimates, returned goods reports and warranty forms. They write emails to suppliers and customers regarding the status of shipments, to provide updates and to respond to requests for information.

### ***Oral Communication***

Partspersons respond to customer inquiries about the availability of parts and products. They speak to suppliers to place, clarify and verify orders. Partspersons discuss inventories, retail displays and other matters with managers and supervisors. They may provide instructions to apprentices.

### ***Numeracy***

Partspersons measure parts for dimensions such as outside diameters (OD), inside diameters (ID), lengths and thicknesses. They compare measurement of parts to specifications. They estimate wear on parts and calculate the capacities, dimensions and weights of parts. Partspersons may reconcile daily sales invoices and calculate mark-ups, discounts, surcharges, and invoice amounts.

### ***Thinking Skills***

Partspersons plan and carry out tasks such as ordering, shipping and receiving parts, and entering and organizing inventory. They judge the condition of salvaged and refurbished parts and locate substitutes for parts that are no longer available. Partspersons use thinking skills to approve and reject warranty claims.

### ***Working with Others***

Partspersons work closely with co-workers, such as shippers and receivers, drivers, service managers and trades people, to ensure customers' needs are met. They work independently when providing services to customers, placing and responding to telephone calls, searching inventory databases and processing orders. Partspersons may integrate job tasks with co-workers when lifting heavy parts and counting inventory. They may assist with the training of new employees.

### ***Digital Technology***

Partspersons operate point of sale equipment such as electronic cash registers, bar scanners and scales. They search organizational and manufacturers' databases for availability, location and prices of parts. They use sales management and billing software. Partspersons use communication devices to send and receive information.

### ***Continuous Learning***

Partspersons are continuously learning in order to remain current with advances in their industry. They may read product bulletins and take courses offered by manufacturers and sector councils. They may take training provided by suppliers of specific parts. They may take training for their organization's inventory and sales software, and for other topics such as customer service and safe work practices.

**BLOCK A****COMMON OCCUPATIONAL SKILLS**

<b>Trends</b>	<p>The use of digital devices, computer software and online resources continues to rise in popularity. Computer storage devices are replacing paper for storing work-related documentation. Multi-media communication such as e-mail, cellular and wireless technology as well as digital photography are being used to convey information.</p> <p>Knowledge of legislated environmental and safety acts is recommended. The use and awareness of personal protective equipment (PPE) and safety equipment is increasing.</p>
<b>Related Components</b>	All components apply.
<b>Tools and Equipment</b>	See Appendix A.

**Task 1****Performs safety-related functions.**

<b>Context</b>	Partspersons need to be familiar with safety procedures, the location of PPE and safety equipment, and how to properly use that equipment.
----------------	--

**Required Knowledge**

K 1	types of PPE such as boots, respiratory equipment, hardhats, gloves, ear protection and eye protection
K 2	types of safety equipment such as eye wash stations, first aid kits, fire extinguishers, fire blankets, spill containment equipment, safety harnesses and lanyards
K 3	location of safety equipment
K 4	applicable safety standards and regulations such as WHMIS, material safety data sheets (MSDS) and OH&S
K 5	fire hazards
K 6	good housekeeping practices
K 7	lock-up procedures
K 8	security and crime prevention procedures

K 9	handling techniques for sensitive inventory such as air bags and air brake chambers
K 10	handling and transportation of dangerous goods

---

### Sub-task

#### A-1.01 Maintains safe work environment.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

### Key Competencies

A-1.01.01	follow jurisdictional regulations and company policies regarding safety
A-1.01.02	recognize and act upon unsafe or potentially hazardous conditions such as oil on the floor, tripping hazards or an obstruction in a pathway
A-1.01.03	handle and store dangerous goods such as batteries, and corrosive and explosive chemicals in designated areas
A-1.01.04	dispose of dangerous goods according to environmental regulations
A-1.01.05	recognize and correct unsafe practices such as a co-worker not wearing appropriate PPE or operating lifting equipment in an inappropriate manner
A-1.01.06	perform housekeeping duties such as sweeping floors and disposing of packaging material

---

**Sub-task****A-1.02 Uses personal protective equipment (PPE) and safety equipment.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

A-1.02.01	ensure proper fit of PPE such as masks, gloves and hard hats
A-1.02.02	seek assistance when unfamiliar with how to use PPE or safety equipment such as charcoal masks and latex gloves
A-1.02.03	use safety equipment according to operating instructions
A-1.02.04	inspect PPE and safety equipment such as lifting straps and chain slings
A-1.02.05	maintain PPE and safety equipment such as eye wash stations and breathing apparatus
A-1.02.06	store safety equipment in designated area
A-1.02.07	recognize worn, damaged, expired or defective PPE and safety equipment and remove from service or replace

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**Task 2****Uses tools and equipment.**

<b>Context</b>	Partpersons need to know how to use a wide range of tools and equipment to complete their work accurately and in a timely fashion. Proper use of PPE and safety equipment is mandatory when operating tools and equipment.
----------------	--

**Required Knowledge**

K 1	types of catalogues such as printed and electronic
K 2	types of price lists such as retail, wholesale and cost
K 3	manufacturers' product lines
K 4	employers' product lines and suppliers
K 5	catalogue indexing such as alphabetical index
K 6	types of hand tools
K 7	standard/imperial (Society of Automotive Engineers [SAE]) and metric systems
K 8	types of power tools such as grinders, cut-off saws, hydraulic presses and electric drills

K 9	operating procedures
K 10	power tool safety procedures
K 11	types of warehouse tools and equipment such as forklifts, pallet jacks, handcarts, banding and strapping equipment, and air staplers
K 12	applications of warehouse tools and equipment
K 13	limitations of lifting equipment
K 14	certification and training requirements for operating lifting equipment
K 15	types of measuring and testing tools and equipment such as measuring tapes, vernier calipers, micrometers, scales, battery testers and chargers
K 16	types of business machines such as facsimile (fax) machines, scanners, photocopiers, debit/credit card machines, cash registers, printers, calculators and postage meters
K 17	computer and digital devices such as tablets, cell phones, cameras, laptops, memory sticks, CDs and DVDs
K 18	applicable systems such as cataloguing, inventory control, invoicing, pricing, scanning and purchasing systems
K 19	applicable PPE and safety equipment, jurisdictional regulations and procedures

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### Sub-task

#### A-2.01 Uses catalogues and price lists.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

### Key Competencies

A-2.01.01	navigate suppliers' web sites
A-2.01.02	interpret and distinguish manufacturers' terminology
A-2.01.03	identify supplier of a specific item
A-2.01.04	locate part and part number
A-2.01.05	interpret price list

---

**Sub-task****A-2.02 Uses hand tools.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

A-2.02.01	select and use hand tools such as knives, magnifying glasses, staplers and paint markers
A-2.02.02	maintain hand tools
A-2.02.03	store hand tools in designated area
A-2.02.04	recognize worn, damaged or defective hand tools, remove from service and initiate repair

---

**Sub-task****A-2.03 Operates power tools.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

A-2.03.01	select and use power tools such as drills, hydraulic hose crimpers and chop saws
A-2.03.02	perform basic maintenance on power tools such as recharging the battery
A-2.03.03	store power tools in designated area
A-2.03.04	recognize worn, damaged or defective power tools, remove from service and initiate repair



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**Sub-task****A-2.04 Operates warehouse tools and equipment.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

A-2.04.01	select and use warehouse tools and equipment according to task
A-2.04.02	operate warehouse equipment such as forklifts, hoists and pallet jacks recognizing safe lifting locations and points to move parts
A-2.04.03	store warehouse tools and equipment in designated area
A-2.04.04	inspect warehouse tools and equipment such as fork lifts and pallet jacks before use
A-2.04.05	perform basic maintenance on warehouse tools and equipment
A-2.04.06	recognize worn, damaged or defective warehouse tools and equipment, remove from service and initiate repair

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**Sub-task****A-2.05 Uses measuring and testing tools and equipment.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

A-2.05.01	select and use measuring and testing tools and equipment such as vernier calipers, thread pitch gauges, battery testers and belt measuring tools
A-2.05.02	inspect and maintain measuring and testing tools and equipment such as changing the battery in electronic calipers
A-2.05.03	store measuring and testing tools and equipment in designated area
A-2.05.04	recognize worn, damaged or defective measuring and testing tools and equipment, remove from service and initiate repair

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**Sub-task****A-2.06 Operates business machines.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

A-2.06.01	select and use business machines according to task
A-2.06.02	place business machines in most effective location
A-2.06.03	secure business equipment such as cash registers when unmanned
A-2.06.04	perform basic maintenance on business machines such as replacing cartridges and ensuring there is paper
A-2.06.05	recognize worn, damaged or defective business machines, remove from service and initiate servicing

---

**Sub-task****A-2.07 Uses computers and digital devices.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

A-2.07.01	communicate, update and access information using digital devices such as tablets, cell phones, cameras and laptops
A-2.07.02	create and interpret computer-generated documents such as customer records, purchase orders (PO), waybills, pack lists and special orders
A-2.07.03	navigate online software programs such as inventory and ordering control systems, using intranets, the Internet and virtual private networks, to search, order, update and send information
A-2.07.04	log onto computer and load programs
A-2.07.05	troubleshoot and/or report computer system and program problems
A-2.07.06	secure or turn off all digital devices when not manned
A-2.07.07	maintain computer components such as keyboards and computer screens

---

**Task 3****Organizes work.**

**Context** Time management of priorities and knowing where to find the accurate information quickly is necessary to complete tasks efficiently.

**Required Knowledge**

K 1	work related document media such as digital, online and paper
K 2	types of documents such as catalogues, technical service bulletins, recalls, manuals and maintenance records
K 3	location of documentation, catalogues and media
K 4	critical deadlines and schedules
K 5	priorities and cut-off times
K 6	location of parts in warehouse

---

**Sub-task****A-3.01 Uses work-related documents.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

A-3.01.01	interpret documentation such as MSDS, warranties, schematics and transportation of dangerous goods (TDG) booklets
A-3.01.02	determine relevant information to provide to customers or technicians
A-3.01.03	locate documentation and media
A-3.01.04	complete forms such as warranty claims and equipment registration documents
A-3.01.05	file relevant information such as field service action (FSA) technical service bulletins (TSB) and MSDS according to company filing system

---

**Sub-task****A-3.02                      Prioritizes tasks.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

A-3.02.01	manage multiple tasks at the same time
A-3.02.02	reassess priorities considering factors such as due date, dollar value and down time to customer
A-3.02.03	assign a schedule to work load
A-3.02.04	sequence tasks to respect cut-off times for items such as stock orders and air freight orders
A-3.02.05	map out inventory picking sequence to save time
A-3.02.06	unpack material according to importance

---

**Task 4****Communicates with others.**

**Context**                      Communication is crucial in the partsperson trade. Partspersons must use proper etiquette and techniques when interacting with others in order to present a professional image regardless of the communication method being used.

**Required Knowledge**

K 1	parts terminology
K 2	active listening techniques
K 3	verbal and non-verbal communication techniques
K 4	questioning techniques such as open ended and closed
K 5	e-mail/text etiquette
K 6	telephone etiquette
K 7	techniques to deal with difficult customers
K 8	computer software, programs and business data systems
K 9	writing techniques such as grammar, punctuation, spelling and clarity
K 10	basic sketching techniques
K 11	company standard forms and letters

K 12	multi-phone lines and messaging systems
K 13	reference tools, business machines and communication equipment such as photocopiers, radio frequency identification devices (RFIDs), intercom systems and printed/electronic catalogues

---

### Sub-task

#### A-4.01 Communicates in person.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

#### Key Competencies

A-4.01.01	acknowledge customer with a greeting and proper body language
A-4.01.02	use active listening skills to identify customers' needs
A-4.01.03	communicate with customers by asking closed and open-ended questions
A-4.01.04	present an image of professionalism by using appropriate demeanor and language
A-4.01.05	communicate with other professionals such as technicians, co-workers, management and suppliers in a professional manner
A-4.01.06	use techniques to deal with difficult customers and to resolve conflicts

---

### Sub-task

#### A-4.02 Communicates in writing and through illustrations.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

#### Key Competencies

A-4.02.01	use writing techniques such as grammar, punctuation, spelling and clarity to present a professional image
A-4.02.02	use e-mail/text etiquette when corresponding with others such as suppliers, customers and public agencies
A-4.02.03	provide illustrations to effectively convey mechanical components to customers
A-4.02.04	use the company's standard forms and letters when corresponding with others

---

**Sub-task****A-4.03            Communicates by telephone.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

A-4.03.01	answer telephone with a greeting such as good morning and good afternoon, and identify the company, oneself and your role to the customer
A-4.03.02	use active listening skills to identify customers' needs
A-4.03.03	communicate with customer by asking closed and open-ended questions to determine their technical knowledge level and to lead them through detailed identification of parts
A-4.03.04	present an image of professionalism by using appropriate language
A-4.03.05	communicate with other professionals such as technicians, co-workers, management and suppliers in a professional manner
A-4.03.06	use techniques to deal with difficult customers and to resolve conflicts
A-4.03.07	manage multiple lines and messaging systems

<b>Trends</b>	The provision of customer value-added services such as on-site training, inventory control, communicating preventative maintenance records and expediting service continues to grow. Increasingly, partspersons are using multi-media to efficiently communicate with customers. Greater competition in the industry is emphasizing the importance of high quality customer service.
<b>Related Components (including, but not limited to)</b>	Catalogue racks, media storage library, files, boxes, bags, promotional material, price lists, business cards, CDs, computers and related electronic equipment, Internet tools, DVDs.
<b>Tools and Equipment</b>	See Appendix A.

**Task 5****Provides services to retail customers.**

<b>Context</b>	Partspersons must be resourceful in accessing information in order to satisfy retail customers' needs. For example, they must use their knowledge of sector-specific markets and available technical support as well as be able to use effective communication skills and techniques to understand customer needs in order to provide appropriate products and services.
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**Required Knowledge**

K 1	original equipment manufacturer (OEM) and aftermarket alternative parts
K 2	consequences of inappropriate advice
K 3	available technical support such as manufacturers' support call centres and shop technicians
K 4	options to reduce customer down time
K 5	nature of retail customers' business
K 6	company policies regarding customer service
K 7	function and application of OEM and aftermarket parts
K 8	difference between retail, internal and wholesale customers

K 9	effective communication techniques when dealing with customers
K 10	required specialty installation tools and compounds such as thread lockers, gasket makers and sealants
K 11	PPE requirements and safety procedures when handling products

---

### Sub-task

#### **B-5.01 Identifies retail customers' needs.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

#### **Key Competencies**

B-5.01.01	interpret customer's description of problem and priority by asking closed and open-ended questions to identify parts required
B-5.01.02	compare failed parts against replacement parts to confirm proper fit and function
B-5.01.03	advise customer of related parts and consumables that may be required

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### Sub-task

#### **B-5.02 Provides technical information to retail customers.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

#### **Key Competencies**

B-5.02.01	contact manufacturers' and suppliers' technical support line for assistance in identifying parts and literature such as technical bulletins and specialized installation procedures
B-5.02.02	identify the need for any manufacturers' specialty installation tool requirements
B-5.02.03	research online resources for technical support such as installation instructions, wiring diagrams and preventative maintenance measures



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**Task 6****Provides services to wholesale customers.****Context**

Partspersons must be resourceful in accessing information in order to satisfy wholesale customers' needs. For example, they must use their knowledge of sector-specific markets and available technical support. They must be able to use effective communication skills and techniques to understand customer needs in order to provide appropriate products and services, and to provide technical training opportunities.

**Required Knowledge**

- |      |  |
|------|--|
| K 1  | OEM and aftermarket alternative parts  |
| K 2  | function and application of OEM and aftermarket parts  |
| K 3  | consequences of inappropriate advice   |
| K 4  | available technical support such as manufacturers' support call centres and shop technicians       |
| K 5  | options to reduce customer down time   |
| K 6  | nature of wholesale customers' business  |
| K 7  | company policies regarding customer service  |
| K 8  | difference between retail, internal and wholesale customers  |
| K 9  | effective communication techniques when dealing with customers                                     |
| K 10 | information on specialty installation compounds such as thread lockers, gasket makers and sealants |
| K 11 | information on PPE requirements and safety procedures when handling products                       |
| K 12 | information on specialty products, tools and equipment   |
| K 13 | role of manufacturers' product representatives regarding training                                  |

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**Sub-task****B-6.01 Identifies wholesale customers' needs.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

B-6.01.01	recognize potential product benefits to wholesale customers
B-6.01.02	interpret customer's description of problem, priority and time requirements by asking closed and open-ended questions to identify parts required
B-6.01.03	compare identification number of failed parts against identification number of replacement parts to confirm proper fit and function
B-6.01.04	obtain information from wholesale customers regarding their in-house stocking levels of items such as filters, oils and consumables

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**Sub-task****B-6.02 Provides training opportunities and technical information to wholesale customers.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

B-6.02.01	recognize potential, current and on-going training needs
B-6.02.02	assist in planning and coordinating training events
B-6.02.03	provide technical information to wholesale customers on related parts and consumables that may be required
B-6.02.04	obtain technical information for wholesale customers by contacting manufacturers and suppliers, or by researching online resources

## Task 7

## Provides services to internal customers.

**Context** Partspersons must be resourceful in accessing information in order to satisfy internal customers' needs. For example, they must use their knowledge of sector-specific markets. They must also be able to use effective communication skills and techniques to understand their internal customers' needs in order to provide appropriate products and services.

### Required Knowledge

K 1	types of tools and equipment
K 2	suppliers and manufacturers of tools and equipment
K 3	repair resources for shop equipment
K 4	company policies regarding inventory levels, warranty and cores
K 5	internal customer fleets
K 6	jurisdictional safety inspections
K 7	preventative maintenance programs based on manufacturers' standard operating procedures (SOP) (time-based or mileage-based)
K 8	record keeping procedures
K 9	shop and bulk supplies such as janitorial, stationery, consumables, fluids, hardware and salt
K 10	scrap and precious metals for resale

### Sub-task

#### B-7.01 Identifies internal customers' needs.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

### Key Competencies

B-7.01.01	interpret customer's description of problem and priority by asking closed and open-ended questions to service customer accordingly
B-7.01.02	compare failed parts against replacement parts to confirm proper fit and function
B-7.01.03	obtain information from internal customers regarding their shop supply levels and provide recommendations

---

**Sub-task****B-7.02 Maintains inventory and records for internal customers.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

B-7.02.01	expedite repairs of shop tools and equipment such as air conditioner (AC) machines, floor jacks and torque wrenches according to company practices in order to minimize down time
B-7.02.02	maintain warranty and core returns for internal customers
B-7.02.03	maintain tool catalogues depending on company policies and guidelines
B-7.02.04	maintain historical maintenance records in business data systems

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**Task 8****Provides general customer service and support.**

<b>Context</b>	Customer service is one of the main focuses of the partsperson trade. The ability to recognize customers' requirements is essential for creating lasting customer relationships. Effective communication and the use of efficient business tools and practices allow partpersons to provide a high degree of customer service and support.
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**Required Knowledge**

K 1	nature of customers' business requirements
K 2	difference between retail, internal and wholesale customers
K 3	company guidelines regarding quote expiration, contractual obligations, price levels, customer service and privacy regulations
K 4	effective communication techniques when dealing with customers
K 5	documentation required such as MSDS and TDG manifests
K 6	business data systems for quotes and customer records
K 7	sector-specific cataloguing databases
K 8	related parts and products required to perform customers' tasks
K 9	delivery service levels such as ground, air, express and overnight
K 10	customers' delivery and timeline requirements
K 11	sector-specific motive structural and mechanical systems such as agriculture, automotive, heavy equipment and transit

K 12	OEM and aftermarket alternative parts
K 13	function and application of OEM and aftermarket parts
K 14	types of value-added services such as basic installation, testing parts and batteries, recommending complementary products, on-site inventory management, discount pricing and expediting services
K 15	sales patterns regarding seasonal products
K 16	PPE requirements and safety procedures when handling products
K 17	product improvement programs (PIPs)

---

### Sub-task

#### **B-8.01            Prepares customer quotes.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

### Key Competencies

B-8.01.01	refer to company guidelines to determine respective customer's price level
B-8.01.02	determine additional charges such as freight, duty, environmental, currency exchange rates, and customs and excise fees and taxes
B-8.01.03	enter and retrieve historical information from business data system to compile/update quotes
B-8.01.04	apply contractual obligations to customer quote according to company policies
B-8.01.05	review details of quote, inform customer of parts availability and advise of included value-added services

---

**Sub-task****B-8.02 Provides no-fee value-added services and information.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

B-8.02.01	advise customer of programming, handling and warranty limitations on products
B-8.02.02	advise customer of manufacturers' technical tutorials on products
B-8.02.03	verify functionality of parts by testing components such as batteries, alternators and sensors to confirm customer needs
B-8.02.04	find alternative sources such as machine shops to rebuild core parts, and auto recyclers to locate parts that are no longer available
B-8.02.05	provide customer with literature such as technical bulletins, specialized installation procedures, wiring diagrams, warranty options and preventative maintenance procedures
B-8.02.06	provide after sales follow-up service by confirming accuracy and quality of delivery

---

**Sub-task****B-8.03 Records customer information.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

B-8.03.01	enter and update customer information such as contact information and equipment make, model and serial number, into business data system for internal historical records
B-8.03.02	record customer's payment information such as credit cards or charge accounts into business data system according to company guidelines

---

**Sub-task****B-8.04.            Implements product improvement programs (PIP).**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

B-8.04.01	read notification to determine PIP procedures
B-8.04.02	respond to customer query or inform customer of product improvement
B-8.04.03	acquire product from inventory or from supplier
B-8.04.04	adjust inventory accordingly
B-8.04.05	inform customer or service department that part has been received
B-8.04.06	submit appropriate paper work to manufacturer

## BLOCK C

## PARTS ACQUISITION

<b>Trends</b>	Re-manufactured parts are becoming less common with the availability of foreign manufactured parts at a lesser cost. Operating systems are becoming more complex, making parts acquisition a more precise skill. Serial number driven searches are becoming more common. Information sharing is becoming more common between OEMs and aftermarket.
<b>Related Components (including, but not limited to)</b>	POs, supplier lists, warranty documents (in-house and manufacturer), suppliers' catalogues, service manuals, buyers' guides, cross reference books, pick lists/tickets, supersession lists, discontinue lists, courier schedules, store layout, pens, pencils, order pads, masking tape, packing tape, staples, parts cleaner.
<b>Tools and Equipment</b>	Warehouse tools and equipment, measuring and testing tools and equipment, reference tools, computers, business machines and communication equipment, safety equipment and PPE.

### Task 9

### Identifies parts.

<b>Context</b>	Partspersons identify parts on a continuous basis to provide appropriate parts to meet customers' needs.
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#### Required Knowledge

K 1	motive structural and mechanical systems
K 2	parts terminology
K 3	product lines carried
K 4	power equipment such as small engine, automotive, agricultural, industrial and marine
K 5	tools related to or required for part application
K 6	operating systems
K 7	available cataloguing resources
K 8	technical assistance



K 9	types of supersession records and their purpose
K 10	company policy on supersession records

---

### Sub-task

#### C-9.01 Identifies parts function.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

#### Key Competencies

C-9.01.01	determine what the part is, using techniques such as consulting with customer, comparing part to the catalogue, consulting a colleague and/or taking measurements
C-9.01.02	determine where part fits in the motive system such as electrical, mechanical and hydraulic system

---

### Sub-task

#### C-9.02 Identifies parts application.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

#### Key Competencies

C-9.02.01	verify with customer on the function of part
C-9.02.02	confirm and interpret parts information such as model or model number, casting number, year, make, serial number or vehicle identification number (VIN)
C-9.02.03	consider customer modification to vehicle and/or parts

---

**Sub-task****C-9.03 Identifies parts number.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

C-9.03.01	interpret parts information such as VIN, serial number, make and model to obtain a part number
C-9.03.02	measure dimensions such as width, OD and ID of parts to determine parts number
C-9.03.03	cross-reference information to determine alternate suppliers' parts numbers
C-9.03.04	use supersession to determine current part number

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**Task 10****Sources parts.**

<b>Context</b>	Partspersons must search their inventory and outside suppliers to find and purchase required parts to meet their customers' needs. They may also arrange for delivery of special orders depending on circumstances and priorities.
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**Required Knowledge**

K 1	available vendors such as OEM, aftermarket, rebuilders and recyclers
K 2	competitive marketing
K 3	profit margin
K 4	extra costs such as shipping, customs, currency exchange and brokerage
K 5	suppliers' return policy and warranty
K 6	down time costs
K 7	pick-up procedures
K 8	shipping schedule
K 9	mode of transportation such as air, land and sea
K 10	store and warehouse layout
K 11	bin location system and part location
K 12	alphanumeric system
K 13	size and weight of part

K 14	destination of product such as delivery bin, front counter and back counter
K 15	shortage procedures

---

### Sub-task

#### C-10.01 Searches inventory for parts

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

#### Key Competencies

C-10.01.01	use inventory control system to determine availability of parts and to identify location of bin
C-10.01.02	produce a pick list/ticket to acquire parts needed
C-10.01.03	read a pick list/ticket to locate parts for picking
C-10.01.04	select carrying devices such as hand truck, dolly, cart, battery carrier and forklift depending on size and weight of parts
C-10.01.05	determine picking sequence depending on location and dimension of parts
C-10.01.06	retrieve parts from inventory
C-10.01.07	compare parts by visual inspection and recognize damaged or defective products to confirm part accuracy

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### Sub-task

#### C-10.02 Identifies suppliers.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

#### Key Competencies

C-10.02.01	search available suppliers for most competitive price and availability
C-10.02.02	determine other options such as rebuilders and recyclers
C-10.02.03	identify parts available for rebuilds and source supplier to rebuild parts

---

**Sub-task****C-10.03 Purchases parts.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

C-10.03.01	issue a PO, requisition order or repair order
C-10.03.02	calculate net cost taking into consideration shipping, currency exchange, brokerage and customs
C-10.03.03	make back order arrangements
C-10.03.04	follow up on back orders or outstanding orders with suppliers
C-10.03.05	confirm suppliers' return and warranty policy

---

**Sub-task****C-10.04 Arranges shipment of special orders.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

C-10.04.01	determine mode of transportation such as land, sea and air depending on priority and circumstances
C-10.04.02	consult carrier schedule to determine estimated time of arrival
C-10.04.03	inform shipping department of rush orders
C-10.04.04	place parts on hold for future pick-up
C-10.04.05	track shipment to ensure on-time delivery
C-10.04.06	coordinate delivery of special order to customer

## BLOCK D

## WAREHOUSING AND INVENTORY

<b>Trends</b>	<p>The use of bar coding and RFID systems is increasing. There is more automated ordering and inventory control, monitoring factors such as seasonal items, lost sales, recalls and manual orders. Automated inventory management systems suggest re-order points based on minimum and maximum criteria. Partspersons need to be aware of external factors that can influence their stock levels.</p> <p>Electronic shipping and receiving has increased efficiency. The use of electronic methods for tracking shipments, arranging pick-ups, completing documents and receiving inventory is on the rise. More stringent regulations regarding shipments are in place. Growth in international shipping is resulting in increased documentation.</p>
<b>Related Components (including, but not limited to)</b>	Shipping containers (international, domestic), pallets, labels, shelving, bin boxes, shipping documents, shipping supplies, strapping, stretch wrap, envelopes.
<b>Tools and Equipment</b>	See Appendix A.

### Task 11

### Handles parts and materials.

<b>Context</b>	Partspersons must ensure the effective placement of products in the warehouse for ease of retrieval, increased sales and quick service.
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#### Required Knowledge

K 1	types of warehouse layouts
K 2	dimensions of parts and materials
K 3	space requirements for warehouse equipment
K 4	storage requirements for dangerous goods
K 5	space requirements for potential future expansion
K 6	sensitive products such as electronics, hazardous goods, paint and batteries
K 7	disposal and storage requirements/regulations for sensitive products considering factors such as time, temperature and light

K 8	first in/first out (FIFO) stock rotation
K 9	stock placement systems such as alphanumeric and numeric
K 10	regulations that apply to warehouse equipment
K 11	WHMIS, MSDS, OH&S and PPE

---

### Sub-task

#### D-11.01 Maintains storage design layout.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

#### Key Competencies

D-11.01.01	label locations according to company policy
D-11.01.02	identify location and placement for new parts considering factors such as size, weight, environment, ease of access and volume of sales
D-11.01.03	maintain designated space for incoming inventory considering time of delivery and size of shipment
D-11.01.04	adjust placement of existing parts considering factors such as season and volume of sales
D-11.01.05	maintain loading dock space for shipping and receiving
D-11.01.06	maintain unobstructed pathways to prevent injuries and for ease of access
D-11.01.07	utilize space to maximum potential such as stacking and using hooks rather than laying items flat

---

### Sub-task

#### D-11.02 Handles sensitive products.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

#### Key Competencies

D-11.02.01	recognize sensitive products such as hazardous materials, paints, batteries, chemicals and electronics
D-11.02.02	place and secure sensitive products in designated locations such as locked cabinet, fireproof cabinet, catch basin and temperature appropriate environment
D-11.02.03	wear appropriate PPE according to product being handled

D-11.02.04	use specialized tools and equipment for handling sensitive products such as battery transportation clamps, carts and pouring stations for paints
D-11.02.05	package sensitive products for customer according to company policy and jurisdictional regulations

---

### Sub-task

#### D-11.03. Rotates stock.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

### Key Competencies

D-11.03.01	rotate inventory according to FIFO principle, date code, expiry date, product packaging, obsolescence and date received
D-11.03.02	maintain quality of product such as turning paint can upside down, avoiding weight compression and preventing weathering

---

### Sub-task

#### D-11.04 Places inventory in designated location.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

### Key Competencies

D-11.04.01	verify destination of part by cross referencing part information to location
D-11.04.02	identify placement of overstock by determining if alternate locations have been identified or by finding a location
D-11.04.03	recognize and correct errors in parts location
D-11.04.04	place and display product as intended such as having part number facing outward

---

**Task 12****Performs inventory control.**

**Context** Proper inventory control is important for partspersons to perform their job efficiently on a day to day basis.

**Required Knowledge**

K 1	manufacturers' return policies
K 2	manufacturers' and suppliers' warranty and core requirements
K 3	in-house return policies
K 4	order point systems such as minimum/maximum
K 5	local market trends
K 6	volume discounts
K 7	inventory unit of measure such as length and quantity
K 8	inventory turnover
K 9	seasonal trends
K 10	methods of tracking lost sales such as computer and hand written
K 11	types of lost sales such as stocking and non-stocking
K 12	effect of lost sales and the importance of registering them
K 13	warehouse layout
K 14	company count method
K 15	reasons for inventory count

---

**Sub-task****D-12.01 Manages core and warranty inventory.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

D-12.01.01	refuse returns if requirements are not met such as the original packaging not provided
D-12.01.02	confirm what is covered by the warranty and how the warranty can be exercised at time of return
D-12.01.03	perform visual inspection of core to assess if rebuildable
D-12.01.04	temporarily store core and warranty returns in designated area



D-12.01.05	prepare core and warranty returns such as draining oil in order to obtain full account credit
D-12.01.06	prepare warranty documentation within time limits
D-12.01.07	prepare and send core return and warranty documents to supplier
D-12.01.08	track status of credit for core and warranty return
D-12.01.09	inform customer at time of purchase of requirements for warranty to remain valid such as completing and sending in the warranty card to the manufacturer
D-12.01.10	record information such as serial numbers at time of purchase or installation to track the part for warranty
D-12.01.11	include core parts in inventory value

---

### Sub-task

#### D-12.02      **Handles recalls.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

### Key Competencies

D-12.02.01	read notification to determine recall procedures such as whether parts fall within serial numbers or manufacturing dates
D-12.02.02	retrieve parts and package for return or disposal according to notification instructions
D-12.02.03	submit appropriate paper work to manufacturer
D-12.02.04	adjust inventory accordingly

---

**Sub-task****D-12.03 Maintains stock levels.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

D-12.03.01	identify and report low stock, overstock and obsolete products
D-12.03.02	adjust stock levels according to company policy based on seasonal requirements, phase-in and phase-out requirements and fast-moving stock
D-12.03.03	implement measures to reduce overstock and obsolete products such as disposing of a product
D-12.03.04	recognize and report discrepancies in stock between what is recorded and what is physically in stock through visual inspection, by reviewing stock reports or through periodic inventory checks
D-12.03.05	report lost sales to be able to adjust stock levels to meet demand

---

**Sub-task****D-12.04 Participates in periodic physical inventory count.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

D-12.04.01	identify unmarked parts and assign a part number
D-12.04.02	conduct physical count of inventory
D-12.04.03	compare actual inventory to count sheets to identify variances
D-12.04.04	conduct recount on variances
D-12.04.05	advise appropriate personnel when inventory discrepancies are discovered

## Task 13

## Performs shipping and receiving duties.

**Context** Partspersons must be able to perform shipping and receiving of product in a safe and efficient manner.

### Required Knowledge

- K 1 receiving procedures
- K 2 handling procedures for hazardous goods
- K 3 types of shipping containers
- K 4 inspection procedures
- K 5 shipping terminology such as free/freight on board (FOB) origin or destination points, short shipments and back orders
- K 6 company policies regarding refusal/acceptance of shipments
- K 7 transportation companies' policies regarding claims
- K 8 hazardous goods regulations such as TDG, OH&S, MSDS and WHMIS, and training
- K 9 awareness of customs regulations, brokers and charges
- K 10 company billing documents such as invoices and pick lists/tickets
- K 11 shipping terminology such as consignee, consignor, cash on delivery (COD), prepaid and collect
- K 12 packaging and labelling regulations
- K 13 shipping and handling procedures for dangerous goods
- K 14 types of shipping supplies such as metal, plastic, nylon and cardboard
- K 15 disposal of shipping supplies
- K 16 shipping documents such as bill of lading, commercial invoices and customs documents
- K 17 methods of transportation such as courier, post, air and ground
- K 18 freight company schedules and policies

---

<b>Sub-task</b>	<b>Verifies estimated time of arrival (ETA).</b>
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<b>D-13.01</b>
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<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

<b>Key Competencies</b>
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D-13.01.01	monitor open POs including back orders and confirm ETA
D-13.01.02	contact supplier to verify shipment has been made, obtain way bill numbers to track the shipment or to expedite the shipment
D-13.01.03	inform appropriate party of status of shipment

---

<b>Sub-task</b>
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<b>D-13.02</b>	<b>Receives incoming shipment.</b>
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<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

<b>Key Competencies</b>
-------------------------

D-13.02.01	inspect for and record damage to packaging on the shipping documents
D-13.02.02	refuse damaged product according to company policy
D-13.02.03	unload and unpack shipment, and verify shipping information such as waybills and packing slips with product delivered
D-13.02.04	record discrepancies on shipping documents
D-13.02.05	enter received parts into inventory record system
D-13.02.06	label part numbers to distinguish product
D-13.02.07	place price on product according to location
D-13.02.08	identify back orders on packing list for follow-up
D-13.02.09	compare parts by visual inspection and identifying modifications for accuracy when received
D-13.02.10	inspect and validate transport security seals
D-13.02.11	prioritize the receipt of incoming shipments based on issues such as time constraints and space limitations

---

**Sub-task****D-13.03. Resolves order discrepancies.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

- D-13.03.01 contact supplier for short shipments and arrange for missing product to be shipped pre-paid
- D-13.03.02 report order discrepancy to management
- D-13.03.03 obtain return goods/material authorization (RGA/RMA) number from supplier and attach to shipment to be returned

---

**Sub-task****D-13.04. Prepares for shipment.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

- D-13.04.01 verify invoice or packing slip items for shipping
- D-13.04.02 package and label products for safe and damage-free transport according to jurisdictional regulations
- D-13.04.03 record weight and dimensions of products for calculations of freight charges to complete shipping documentation
- D-13.04.04 communicate with freight company to arrange pick-up and delivery
- D-13.04.05 load shipment

<b>Trends</b>	Partspersons are becoming more aware of and involved in marketing strategy. Online ordering is becoming more prominent. There is a continuing increase of social media for marketing.
<b>Related Components (including, but not limited to)</b>	Gondolas, turnstiles, display fixtures, shelving units, pricing labels, warranty manuals and tags, signage, banners, posters, displays, product literature, invoices (pre-printed, computer generated), deposit books (bank, company), customer account registry.
<b>Tools and Equipment</b>	Reference tools, business machines and communication equipment.

**Task 14****Promotes products and services.**

<b>Context</b>	Partspersons promote various products and services based on customers' requirements, seasonal trends and vendor promotions.
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**Required Knowledge**

K 1	promotional items, coupons and their time frame
K 2	special tags
K 3	pricing
K 4	seasonal trends and items
K 5	available literature
K 6	various products available
K 7	product features and benefits
K 8	sourcing information electronically
K 9	product dangers such as corrosiveness and flammability
K 10	product safety regulations such as labelling, MSDS and TDG
K 11	product warranty
K 12	related products
K 13	price value
K 14	new products

K 15	available and recommended services
K 16	warranty options such as customer installation or service installation
K 17	on-call service
K 18	work order system
K 19	product needed to complete task
K 20	various systems such as mechanical, electrical, hydraulic and cooling
K 21	selling techniques

---

### Sub-task

#### E-14.01 Displays products and literature.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

### Key Competencies

E-14.01.01	choose display method such as open and closed, posters, and clearance tables and bins according to product
E-14.01.02	display current in-store and manufacturers' promotional products and literature
E-14.01.03	maintain display and signage according to company policy
E-14.01.04	determine strategic location for display according to store layout, seasonal trends and product visibility
E-14.01.05	label products with pertinent information such as accurate pricing, alphanumerical listings, product number and bar code
E-14.01.06	select products for display according to seasonal trends, market trends and supplier promotion
E-14.01.07	select and display related products according to promotional items

---

**Sub-task****E-14.02                Recommends products to customer.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

E-14.02.01	explain to customer product benefits such as quality, price, warranty and availability
E-14.02.02	explain product information to ensure correct application and usage
E-14.02.03	recognize customers' needs by asking closed and open-ended questions
E-14.02.04	introduce new and innovative products by explaining their features and benefits
E-14.02.05	recommend related products to assist/enhance product usage

---

**Sub-task****E-14.03                Recommends services to customer.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

E-14.03.01	recognize customers' needs by asking closed and open-ended questions
E-14.03.02	introduce services by explaining their features and benefits
E-14.03.03	recommend related service to assist/enhance product usage
E-14.03.04	offer to test customers' used products such as electrical and electronic components prior to purchase to confirm defect
E-14.03.05	explain mailing list options to customer



## Task 15

## Implements pricing formula.

**Context** Partspersons price products according to company policy, net cost and promotions.

### Required Knowledge

K 1	products
K 2	pricing structures
K 3	price changes such as price increases and promotional prices
K 4	basic mathematics
K 5	additional costs such as freight, taxes, brokerage, environmental fees and currency exchange
K 6	company and customer discount policy
K 7	pricing for discontinued items

---

### Sub-task

**E-15.01** Calculates additional costs.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

### Key Competencies

E-15.01.01	research and determine additional costs such as shipping fees, environmental fees and taxes, and customs and duty fees
E-15.01.02	calculate net cost (landed) for product, taking into consideration labour charges, currency exchange rates, shipping fees and brokerage fees according to company pricing formula
E-15.01.03	calculate customer price taking into consideration net cost and company pricing formula

---

**Sub-task****E-15.02 Overrides price.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

E-15.02.01	modify invoice according to company policy and management instruction
E-15.02.02	verify pricing on specials and promotions
E-15.02.03	compare products to verify quality, warranty and availability
E-15.02.04	research competitors' prices to verify override
E-15.02.05	verify and override pricing errors

---

**Task 16****Processes financial transactions.**

**Context** Partspersons process financial transactions based on company policies. They process various methods of payments, depending on the customer and their type of account.

**Required Knowledge**

K 1	methods of payment such as cash, credit card, cheques, debit card and in-house charge
K 2	company financial practices such as received on account (ROA), terms of payment and central billing
K 3	types of invoices such as cash, charge, credit and quotes
K 4	pricing and discounting structure
K 5	manufacturers' and suppliers' warranty/return policies such as duration of coverage and limitations of coverage
K 6	company accounting system
K 7	basic accounting principles
K 8	related company policies

---

**Sub-task****E-16.01 Generates invoices.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

E-16.01.01	determine types of invoice such as quote, cash, charge and credit
E-16.01.02	apply company pricing formula and discounting structures
E-16.01.03	verify customer's approved credit limit with the company
E-16.01.04	use company invoice systems such as manual and electronic

---

**Sub-task****E-16.02 Accepts payments.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

E-16.02.01	use company point of sale (POS) systems such as manual and electronic
E-16.02.02	obtain authorization for credit card and cheque payments
E-16.02.03	handle cash, make change and provide receipt

---

**Sub-task****E-16.03 Processes customer returns.**

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

**Key Competencies**

E-16.03.01	identify types of returns such as core, warranty or new
E-16.03.02	verify product return eligibility
E-16.03.03	explain return policies to customers
E-16.03.04	verify original receipts

E-16.03.05	label returned items according to company policy
E-16.03.06	place returned items in designated area according to company policy

---

### Sub-task

#### E-16.04 Processes day end reports.

<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>
NV	yes	NV	yes	ND	yes	yes	yes	yes	yes	NV	NV	NV

### Key Competencies

E-16.04.01	balance invoices, cash and credit card receipts according to company policy
E-16.04.02	complete banking forms and financial documents according to company policy



## **APPENDICES**



**Hand Tools**

bolt cutters  
chain cutters  
crimping tools  
cutters  
files  
hacksaws  
hammers  
knives  
magnifying glasses  
o-rings  
pipe cutters

pliers  
pry bars  
punches  
ratchets  
screwdrivers  
socket sets  
stapler  
staple remover  
tin snips  
vices  
wrenches

**Power Tools**

air tools  
battery filling stations  
cut-off saws or chop saws  
drills

grinders  
heat guns  
hydraulic presses  
key cutting machines

**Warehouse Tools and Equipment**

banding and strapping equipment  
carts  
conveyers  
dollies  
fork lifts or lift trucks  
hand carts  
hoists  
ladders  
laminators

mobile cranes  
overhead cranes  
pallet jacks  
shrink wrap machines  
staplers  
ramps  
tape guns  
packing slip envelopes

**Measuring and Testing Tools and Equipment**

belt measurers  
calipers  
electrical testers  
hydrometers

measuring tapes  
micrometers  
thread gauges  
weigh scales



### **Reference Tools, Business Machines and Communication Equipment**

adding machines	microfiche
bar code scanners	photocopiers
calculators	postage meters
cash drawers	price lists – printed and electronic
cash registers	pricing guns
catalogues – printed and electronic	printers
computers/ tablets/laptops	radio frequency identification devices (RFIDs)
debit/credit card machines	scanners
digital cameras	telephones/ cell phones/smart phones
facsimiles	two-way radios
intercom systems	

### **Safety Equipment and Personal Protective Equipment**

coveralls	hardhats
ear protection	protective aprons
eye protection	respirator equipment
eye wash stations	safety boots
defibrillator equipment	safety glasses
fire blankets	safety harness
fire extinguishers	safety vest
fire hoses	shop coats
first aid kits	spill containment equipment
gloves	stretchers
goggles	

<b>aftermarket</b>	parts that are not made by the original equipment manufacturer (OEM)
<b>application</b>	specific make, model and year that a part applies to
<b>back order</b>	goods that cannot be filled at the current time due to a lack of available supply
<b>bill of lading</b>	shipping document that contains information about the shipment (prepared by the shipper for the carrier)
<b>Block A Common Occupational Skills</b>	repetitive general skills for many tasks performed by a partsperson that are common across several blocks
<b>Block B Customer Service</b>	tasks involved in meeting customers' needs
<b>Block C Parts Acquisition</b>	tasks involved in finding and obtaining parts and products
<b>Block D Warehousing and Inventory</b>	tasks involved in the shipping/receiving, storage and management of parts and products
<b>Block E Business Practices</b>	the business and administrative tasks of a partsperson
<b>central billing</b>	billing system that centralizes accounting at one location
<b>consignee</b>	person or company receiving a shipment
<b>consignor</b>	person or company sending a shipment
<b>cores</b>	parts that are returned for re-manufacturing
<b>expedite</b>	to track shipments and intervene in shipping and delivery schedules to meet changing requirements and conditions

<b>FOB (Free on board or Freight on Board – Origin/Destination):</b>	a term subject to interpretation depending on the individual/company, and their usage of the term. It may be as simple as the shipper or the receiver paying all freight charges. In another example the shipper may agree to pay shipping charges the first leg of the journey where the cargo/item is shipped by air transport, and the receiver is responsible for the second leg of the journey when the cargo/item transfers to another mode of transport such as sea/land delivery.
<b>gondola</b>	a double-sided, free-standing shelving unit
<b>net cost</b>	all costs except provincial and federal taxes. The net price includes costs such as freight, customs/brokerage fees and taxes related to the jurisdiction of origin, for example excise and import taxes.
<b>outstanding order</b>	unreceived order with a known date of delivery
<b>overstock</b>	excess stock over maximum stocking levels
<b>phase-in</b>	criteria used to add a part to inventory
<b>phase-out</b>	criteria used to take a part out of inventory
<b>picking</b>	physically retrieving part from internal inventory
<b>short shipment</b>	quantity of goods received is less than quantity indicated in documentation
<b>sources</b>	locating parts from external suppliers
<b>supersession record</b>	record that updates part number changes
<b>turnover</b>	inventory movement over a specified period of time
<b>turnstile</b>	free-standing, rotating display unit
<b>waybill</b>	shipping document that contains information about the shipment (prepared by the carrier for the receiver)
<b>wholesale customer</b>	a customer who purchases OEM or aftermarket parts at a distinct level of wholesale pricing within the company structure

<b>A/C</b>	air conditioning
<b>COD</b>	cash on delivery
<b>ETA</b>	estimated time of arrival
<b>FSA</b>	field service action
<b>FIFO</b>	first in/first out
<b>FOB</b>	free on board or freight on board – origin/ destination
<b>ID</b>	inside diameters
<b>MSDS</b>	material safety data sheet
<b>OD</b>	outside diameters
<b>OEM</b>	original equipment manufacturer
<b>OH&amp;S</b>	Occupational Health and Safety
<b>PIP</b>	product improvement program
<b>PO</b>	purchase order
<b>POS</b>	point of sale
<b>PPE</b>	personal protective equipment
<b>RFID</b>	radio frequency identification
<b>RGA/RMA</b>	return goods/material authorization
<b>ROA</b>	received on account
<b>SAE</b>	Society of Automotive Engineers
<b>SOP</b>	standard operating procedures
<b>TDG</b>	transportation of dangerous goods
<b>TSB</b>	technical service bulletins

<b>VIN</b>	vehicle identification number
<b>WHMIS</b>	Workplace Hazardous Materials Information System

## APPENDIX D

## BLOCK AND TASK WEIGHTING

### BLOCK A COMMON OCCUPATIONAL SKILLS

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	National Average
%	NV	17	NV	10	ND	10	25	20	10	10	NV	NV	NV	14%

Task 1 Performs safety-related functions.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	30	NV	5	ND	15	25	25	20	25	NV	NV	NV	21%

Task 2 Uses tools and equipment.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	20	NV	20	ND	15	10	18	25	25	NV	NV	NV	19%

Task 3 Organizes work.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	20	NV	40	ND	40	30	26	25	25	NV	NV	NV	29%

Task 4 Communicates with others.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	30	NV	35	ND	30	35	31	30	25	NV	NV	NV	31%

### BLOCK B CUSTOMER SERVICE

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	National Average
%	NV	25	NV	10	ND	40	30	25	25	25	NV	NV	NV	26%

Task 5 Provides services to retail customers.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	20	NV	20	ND	25	25	15	25	30	NV	NV	NV	23%

Task 6 Provides services to wholesale customers.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	20	NV	10	ND	25	25	14	25	30	NV	NV	NV	21%

Task 7 Provides services to internal customers.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	20	NV	35	ND	25	25	46	25	30	NV	NV	NV	29%

Task 8 Provides general customer service and support.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	40	NV	35	ND	25	25	25	25	10	NV	NV	NV	27%

## BLOCK C PARTS ACQUISITION

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	National Average
%	NV	26	NV	30	ND	20	20	25	30	30	NV	NV	NV	26%

Task 9 Identifies parts.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	50	NV	40	ND	50	70	58	55	60	NV	NV	NV	55%

Task 10 Sources parts.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	50	NV	60	ND	50	30	42	45	40	NV	NV	NV	45%

## BLOCK D WAREHOUSING AND INVENTORY

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	National Average
%	NV	20	NV	30	ND	15	15	12	25	25	NV	NV	NV	20%

Task 11 Handles parts and materials.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	30	NV	50	ND	40	10	45	35	33	NV	NV	NV	35%

Task 12 Performs Inventory control.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	35	NV	20	ND	35	30	32	40	33	NV	NV	NV	32%

Task 13 Performs shipping and receiving duties.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	35	NV	30	ND	25	60	23	25	34	NV	NV	NV	33%

## BLOCK E BUSINESS PRACTICES

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	National Average
%	NV	12	NV	20	ND	15	10	18	10	10	NV	NV	NV	14%

Task 14 Promotes products and services.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	40	NV	10	ND	40	50	50	25	70	NV	NV	NV	41%

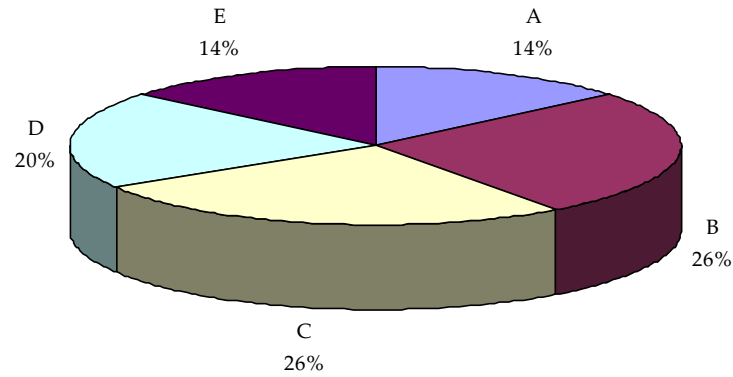
Task 15 Implements pricing formula.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	25	NV	45	ND	20	25	25	40	15	NV	NV	NV	28%

Task 16 Processes financial transactions.

	<u>NL</u>	<u>NS</u>	<u>PE</u>	<u>NB</u>	<u>QC</u>	<u>ON</u>	<u>MB</u>	<u>SK</u>	<u>AB</u>	<u>BC</u>	<u>NT</u>	<u>YT</u>	<u>NU</u>	
%	NV	35	NV	45	ND	40	25	25	35	15	NV	NV	NV	31%





## TITLES OF BLOCKS

BLOCK A	Common Occupational Skills	BLOCK D	Warehousing and inventory
BLOCK B	Customer service	BLOCK E	Business practices
BLOCK C	Parts acquisition		

\*Average percentage of the total number of questions on an interprovincial examination, assigned to assess each block of the analysis, as derived from the collective input from workers within the occupation from all areas of Canada. Interprovincial examinations typically have from 100 to 150 multiple-choice questions.

# APPENDIX F

## TASK PROFILE CHART – Partsperson

BLOCKS	TASKS	SUB-TASKS				
A – COMMON OCCUPATIONAL SKILLS	1. Performs safety-related functions.	1.01 Maintains safe work environment.	1.02 Uses personal protective equipment (PPE) and safety equipment.			
	2. Uses tools and equipment.	2.01 Uses catalogues and price lists.	2.02 Uses hand tools.	2.03 Operates power tools.	2.04 Operates warehouse tools and equipment.	2.05 Uses measuring and testing tools and equipment.
		2.06 Operates business machines.	2.07 Uses computers and digital devices.			
	3. Organizes work.	3.01 Uses work related documents.	3.02 Prioritizes tasks.			
	4. Communicates with others.	4.01 Communicates in person.	4.02 Communicates in writing and through illustrations.	4.03 Communicates by telephone.		
B -CUSTOMER SERVICE	5. Provides services to retail customers.	5.01. Identifies retail customers' needs.	5.02 Provides technical information to retail customers.			
	6. Provides services to wholesale customers.	6.01 Identifies wholesale customers' needs.	6.02. Provides training opportunities and technical information to wholesale customers.			

BLOCKS	TASKS	SUB-TASKS			
C -PARTS ACQUISITION	7. Provides services to internal customers.	7.01 Identifies internal customers' needs.	7.02 Maintains inventory and records for internal customers.		
	8. Provides general customer service and support.	8.01 Prepares customer quotes.	8.02 Provides no-fee value-added services and information.	8.03 Records customer information.	8.04 Implements product improvement programs (PIP).
	9. Identifies parts.	9.01 Identifies parts function.	9.02 Identifies parts application..	9.03 Identifies parts number.	
D -WAREHOUSING AND INVENTORY	10. Sources parts.	10.01 Searches inventory for parts	10.02 Identifies suppliers.	10.03 Purchases parts.	10.04 Arranges shipment of special orders.
	11. Handles parts and materials.	11.01 Maintains storage design layout.	11.02 Handles sensitive products.	11.03 Rotates stock.	11.04 Places inventory in designated location.
	12. Performs Inventory control.	12.01 Manages core and warranty inventory.	12.02 Handles recalls.	12.03 Maintains stock levels.	12.04 Participates in periodic physical inventory count.
	13. Performs shipping and receiving duties.	13.01 Verifies incoming shipment.	13.02 Verifies estimated time of arrival (ETA).	13.03 Resolves order discrepancies.	13.04 Prepares for shipment.

BLOCKS	TASKS	SUB-TASKS			
E -BUSINESS PRACTICES	14. Promotes products and services.	14.01 Displays products and literature.	14.02 Recommends products to customer.	14.03 Recommends services to customer.	
	15. Implements pricing formula.	15.01 Calculates additional costs.	15.02 Overrides price.		
	16. Processes financial transactions.	16.01 Generates invoices.	16.02 Accepts payments	16.03 Processes customer returns.	16.04 Processes day end reports.