



**Australian Government**

# **TLIP4031 Maintain customer credit accounts and services**

**Release: 1**

# TLIP4031 Maintain customer credit accounts and services

## Modification History

Release 1. This is the first release of this unit of competency in the TLI Transport and Logistics Training Package.

## Application

This unit involves the skills and knowledge required to maintain customer credit accounts and services in accordance with workplace requirements, as part of work activities in the transport and logistics industry.

It includes establishing and maintaining customer credit accounts and services, and maintaining a customer information system.

Work is performed under some supervision generally within a team environment.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

## Pre-requisite Unit

Not applicable.

## Competency Field

P – Administration and Finance

## Unit Sector

Not applicable.

## Elements and Performance Criteria

### ELEMENTS

Elements describe the essential outcomes.

#### **1 Establish and maintain customer credit accounts and services**

### PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1 Lines of credit and other credit facilities are established and communicated to customers
- 1.2 Customer payment schedules are monitored
- 1.3 Debtors are regularly identified and listed to initiate follow-up action

- 1.4 Debt recovery procedures are initiated and if unsuccessful, approval is sought to write off bad debts
- 2 Maintain customer information system**
- 2.1 Status of credit accounts is conveyed to customers on a regular basis
  - 2.2 Statistical returns are prepared displaying actual against anticipated performance
  - 2.3 Database information regarding products and services sales on credit is maintained
  - 2.4 Customer queries are dealt with promptly and courteously
  - 2.5 Security of database and data integrity is maintained

## Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

## Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions can be found in the Companion Volume Implementation Guide.

## Unit Mapping Information

This unit replaces and is equivalent to TLIP4031A Maintain customer credit accounts and services.

## Links

Companion Volume implementation guides are found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=df441c6e-213d-43e3-874c-0b3f7036d851>