



Basic Agro-food Processing

Level I

Based on October 2019 Version Occupational standards

Module Title: - **Performing Stock Control Procedures**

LG Code: IND BFP1 M13 LO (1-2) LG (44-45)

TTLM Code: IND BFP1 TTLM 1020v1

October 2020



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LG #44

LO #1 Receive and process incoming goods

Instruction sheet

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Maintaining cleanliness and orderliness store policies and procedures
- Unpacking goods using correct handling techniques and equipment
- Removing and disposing packing materials with relevant legislative requirement
- Checking and validating incoming stock
- Inspecting and recording items for damage, quality, use-by dates, breakage or discrepancies
- Recording stock levels and store stock *systems*
- Rotating stock and storing FIFO principle
- Dispatching the Stock to appropriate area
- Applying stock price and code labels

This guide will also assist you to attain the learning outcomes stated in the cover page.

Specifically, upon completion of this learning guide, you will be able to:

- Maintain cleanliness and orderliness store policies and procedures
- Unpack goods using correct handling techniques and equipment
- Remove and dispose packing materials with relevant legislative requirement
- Check and validating incoming stock
- Inspect and record items for damage, quality, use-by dates, breakage or discrepancies
- Record stock levels and store stock *systems*
- Rotate stock and storing FIFO principle
- Dispatch the Stock to appropriate area

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- Apply stock price and code labels

Learning Instructions:

Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below.
3. Read the information written in the information Sheets
4. Accomplish the Self-checks
5. Perform Operation Sheets
6. Do the “LAP test”

Information Sheet 1	Maintain cleanliness and orderliness store policies and procedures
----------------------------	---

1.1. Maintain cleanliness and orderliness store policies and procedures

1.1.1 Maintaining storage areas

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The general requirements commonly applied industry-wide in order to maintain a stock area are keeping the stores area clean and tidy at all times by removing waste. This means physically removing empty boxes, cartons, crates and dividers from which stock has been taken. Packaging and wrapping materials used to protect and wrap items unloaded on to shelves and/or into containers. Cleaning the area in line with venue requirements such as in accordance with the cleaning schedule for the area. This may include:

- Sweeping
 - Mopping
 - Using a pressure washer
- ❖ Identifying and removing unsafe, unusable or unsalable items from the storage areas such as:
- Damaged items
 - Food that has exceeded its use-by date
 - Food contaminated by vermin
 - Cleaning up spills as they occur
 - Implementing cleaning schedules for the area
 - Removing wrapping, packaging and waste
 - Cleaning and tidying as part of other store room activities as opposed to making „cleaning and tidying“ a separate task.
- ❖ Storing all stock as soon as possible after delivery to:
- Guard against theft
 - Remove potential tripping hazards
 - Keep the area clear for future deliveries
 - Refrigerate items requiring refrigeration

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- ❖ Protect against damage that can occur to items left lying around in the delivery area caused by other deliveries being made or general staff traffic in the immediate area. This include:
 - Keeping stores area well-lit and ventilated to deter pests and allow for easy identification of stock items and problem issues.
 - Keeping shelves, benches, pallets, bins and other storage containers in good order and inspecting the area/fixtures and fittings on a regular basis for signs of damage or deterioration or other problems such as stability, security and pest infestation
 - Maintaining all equipment and storage areas in accordance with the relevant occupational health and safety requirements and (for beverage storage and food related items such as single-use items and food packaging) the requirements of food safety protocols for the property.
 - Conducting preventative maintenance checks on floors, walls, lighting, storage areas and containers and fixtures within the stores areas
 - Checking the temperature of refrigerated and frozen food storage areas.
 - Initiating preventative maintenance servicing for plant and equipment in the stores area as opposed to waiting until items break down before servicing them.
 - Restricting access to the stores area as required by the organization. This can involve prohibiting staff access to the stores areas, or limiting access to nominated staff only at designated times
 - Control Dust: Dust accumulation can cause major issues for a facility, including poor air quality, fire and explosion hazards, and malfunctioning equipment. Regular surface cleaning will help reduce these risks. If your facility produces a lot of dust, an industrial vacuum is the safest and most effective way to manage dust removal. You also should have your air ventilation system cleaned and checked regularly (at least annually).

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Self-check 1	Written test
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Name-----ID-----Date-----

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I say true or false

- 1 Dust accumulation can cause major issues for a facility, including poor air quality, fire and explosion hazards, and malfunctioning equipment.(3points)
- 2 Cleaning and tidying as part of other store room activities.(2point)

Test II: Choose the correct answer (5 point each questions)

- 1 The general requirements commonly applied industry-wide in order to maintain a stock area are:
 - A. Keeping the stores area clean and tidy at all times
 - B. Protect against damage that can occur to items left lying around in the delivery
 - C. Storing all stock as soon as possible after delivery.
 - D. all
2. Identifying and removing unsafe, unusable or unsalable items from the storage areas such as:
 - A. Damaged items
 - B. Food that has exceeded its use-by date
 - C. Food contaminated by vermin
 - D. Cleaning up spills as they occur
 - E. none

Test III: Short Answer Questions

1. Define the difference b/n store police and store procedure? (3point)

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2. How to clean the storage room? (2point)

You can ask you teacher for the copy of the correct answers.

Note: Satisfactory rating ≥10points

Unsatisfactory - below 10 points

Score = _____

Rating: _____

Answer Sheet

Name: _____ Date: _____ ID _____

1. _____

_____.

2. _____

_____.



Information Sheet 2	Unpacking goods using correct handling techniques and equipment
---------------------	---

2.1. Unpacking goods using correct handling techniques and equipment

2.1.1 Unpacking

Open and remove the contents of (a suitcase, bag, or package). "Remove (something) from a suitcase, bag, or package. Before you move, or unpack, any stock at all there is one thing you should always do check that the stock you are about to handle is the correct stock. Usually there is a label, or a reference number, to identify the stock. A simple check can save lots of wasted time unpacking or moving the wrong goods, and then having to do everything again.

2.1.2 Correct handling techniques unpacking goods

Many items received into stock will need to be unpacked as part of the storage process. When unpacking stock you must follow all house policies and procedures. For example, if the venue had a „full“ carton policy in the store rooms you would not unpack individual items from cartons.

Unpacking stock can require you to:

- Remove individual items from cartons and/or packaging and load stock into storage bins or storage areas.
- Check the quality and suitability of every item unpacked to ensure:
- Items are not damaged or broken.
- Nothing is leaking.
- No seals are broken.
- Items, cans, drums, bottles, packets and sacks of goods are intact.

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- Use-by and/or best-before dates are appropriate to the usage rate of the venue.
- Check to ensure no pests, rodents, vermin or dirt is introduced into the store through the items being unpacked

Verify items look suitable for the purpose they are to be used for using the various senses (smell, sight, touch and taste as appropriate) and a combination of industry and venue knowledge and common sense. This involves a quick check of each item to ensure (as appropriate to the nature of each individual item):

- Linen is the expected/correct colours. If you know the property always uses white sheets, it would cause concern if the delivery of sheets you were unpacking was blue in colours.
- Fruit and vegetables are fit for the purposes they are going to be used for. This may involve checking to ensure food intended to be eaten „as is” is free from blemishes, are not bruised and are suitable for sale or use.
- Items to be used in stocks, stews and sauces can be of lesser quality but must still meet internal specifications and all food safety requirements.
- Matches the information on the carton or packaging from which it is being taken
- The fitting for light globes matches the fittings in the venue. There is no point stowing „bayonet” light fittings in store if the property uses „screw in” globes
- Adhere to „full box/carton” policy in stores where this is an internal requirement.

2.1.3 Unpacking goods handling (lifting) **Equipment’s**

- ✓ electronic bar coding equipment
- ✓ weighing machines
- ✓ thermometers

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- ✓ trolley return equipment
- ✓ Pallet lifting
- ✓ cutting equipment
- ✓ protective clothing
- ✓ forklift

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Self-Check – 2	Written test
-----------------------	---------------------

Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test .I say true or /false

1. After you move, or unpack, any stock at all there is one thing you should always do check that the stock is the correct stock.(2point)
2. When unpacking the stock you should not follow all house policies and procedures (3point).

Test II Choose the best answer (5 point each questions)

1. Check the quality and suitability of every item unpacked to ensure:
 - A. Items, cans, drums, bottles, packets and sacks of goods are intact
 - B. Nothing is leaking
 - C. No seals are broken.
 - D. Items are not damaged or broken
 - E. E.ALL
2. Which one is Unpacking goods handling (lifting) Equipment's?
 - A. electronic bar coding equipment
 - B. weighing machines
 - C. thermometers
 - D. forklift
 - E. E.ALLL

Test III short answer *questions*

1. Define the Correct handling techniques of goods and equipment?(5point

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Answer sheet

Name: _____ Date: _____

1. _____

_____.

2. _____

_____.

Note: Satisfactory rating - ≥ 7.5 points Unsatisfactory - below 7.5 points

You can ask your teacher for the copy of the correct answers.

Score = _____

Rating: _____



Information Sheet 3	Removing and disposing packing materials with relevant legislative requirement
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3.1 Removing and disposing packing materials with relevant legislative requirement

The removal and disposal of waste is an important part in the running of any business. Waste is defined in the directive as any substance or object that is discarded by a waste producer. A waste producer can be any person or organization that produces waste.

❖ Waste disposal method of damaged stock

- **Landfill:** A land fill site, also known as a tip, dump, rubbish dump, garbage dump, or dumping ground, is a site for the disposal of waste materials. Landfill is the oldest and most common form of waste disposal, although the systematic burial of the waste with daily, intermediate and final covers only began in 1940s. In the past, refuse was simply left in piles or thrown into pits; in archeology this is known as a midden.
- **Incineration:** Incineration is a waste treatment process that involves the combustion of organic substances contained in waste materials. Incineration and other high-temperature waste treatment systems are described as "thermal treatment". Incineration of waste materials converts the waste into ash, flue gas and heat.

❖ The wastes generated from the stock treated using 3-R :-

- Reduce means that manage waste is to not produced it.
- Reuse means reuse products for the same use and for another process as input.

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- Recycle means remanufacture the products or materials and sell it as a new product.

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Self-Check – 3	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test- I say true or False

1. The removal and disposal of waste is not an important part in the running of any business.(3point)
2. Waste is defined in the directive as any substance or object that is discarded by a waste producer.(2point)

Test- II Choose the best answer (5point each questions)

1 -----Is a waste treatment process that involves the combustion of organic substances contained in waste materials?

- | | |
|-----------------|-------------------|
| A. Incineration | C. Transportation |
| B. Landfill | D. Decomposition |

2. ----- is the oldest and most common form of waste disposal, although the systematic burial of the waste with daily, intermediate and final covers only began in 1940s.

- | | |
|--------------------|------------|
| A. A. landfill | C. Recycle |
| B. B. Incineration | D. Reuse |

Test III. Short answer questions

1. Define the difference between recycling and re use of waste?(3point)
- A.** Define how to reduce waste?(2point)

Answer Sheet

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Name: _____ Date: _____

1. _____

_____.

2. _____

_____.

Note: Satisfactory rating ≥ 10 points Unsatisfactory - below 10 points

Score = _____
Rating: _____



4.1 Checking and validating incoming stock

When suppliers send orders to their customers (usually retailers or distributors), errors sometimes occur. In some cases the product is damaged, the quantity is lacking or the items received don't match the purchase order. Customers must properly validate their incoming shipments of inventory to avoid these potentially costly issues.

4.1.1 Validating inventory

The process of validating inventory receipts varies depending on company policies. The most thorough, yet time consuming method, is to open all boxes to review the contents. Another option is to pick boxes at random from the shipment and check them. The customer can also check the packing slip and compare it with the initial purchase order to see if the order is complete. Some retailers simply use a barcode system that validates each inventory package based on a label provided by the manufacturer or supplier.

- **Confirm before paying**

It is important to validate inventory receipts prior to paying invoices to the supplier. Before sending a check or credit card payment to cover the invoice, the retailer must ensure that the purchase order, invoice, packing slips and actual inventory receipts match. This process is crucial to proper accounting at businesses that order inventory on a regular basis. 'Goods receiving' is the function of checking items delivered to the business, either coming in as new stock or as supplies. This includes inspecting the quality, condition, and quantity of any incoming goods, and allocating them to a space in the warehouse.

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All items purchased by the business serve a specific function, whether they are supplies to be used internally, or stock to be on sold to customers. Keeping track of all items coming into the warehouse ensures that that the right products are received and promptly stored in an appropriate place. Following a goods receiving process can help to maintain an efficient warehouse and identify any issues with suppliers.

4.1.2 Step of checking process for incoming stock.

1. Match the delivery to a purchase order

First ensure the delivery has come to the right place by matching the details on the Consignment Note to the Purchase Order raised by your business. The Purchase Order should also be used to check that each item matches the description and quantities ordered. Generally, the boxes or cartons will have a description of the item and quantities of its contents. Ensure you record the following for each new delivery:-

- The date and time goods arrived
- the name of the delivery partner and driver
- Check off quantities and description of goods against purchase order
- Note any discrepancies
- Names of the personnel who performed these checks

Maintaining accurate reports is essential for accurate book keeping as well as resolving any disputes that may arise in the future regarding the items or supplier. If there is no purchase order or record of the order, check with your supervisor or purchasing department before rejecting the goods.

2. Check products are not damaged

Before accepting the delivery, it's important to conduct a quality check to ensure the items are not damaged or malfunctioning. It's not always feasible to open

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each carton and check every single item, particularly for large shipments. So in these cases you may wish to complete a spot check rather than open each and every carton. Check for signs of breakage or faults, and ensure all items are as described on the purchase order. If any damaged items are found in the delivery, record the extent of the damage on the consignment note and immediately notify the supplier with details of the issue to discuss the next steps.

3. Log received items into your inventory

Enter the items you have received into your warehouse management system as soon as possible, including the date and quantities received. This will allow the stock to be allocated to new orders right away.

4. Allocate storage space for goods

It's important to pack away a new delivery promptly to ensure no items become lost or damaged. Supplies should be distributed to the appropriate person in the business, or packed away in the usual space to be accessed when required. For goods received in as stock, these items will need to be allocated a space in the warehouse for storage until ready to be picked for an order.

5. Notify your accounts payable department

Send a copy of the signed and dated consignment note to your accounts payable team. This information can then be matched with the invoice from the supplier to ensure payments are only made for items that were actually received.

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Self-Check – 4	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I True /False

- 1 The process of validating inventory receipts is the same depending on company policies. (2point)
- 2 Before accepting the delivery, it's important to conduct a quality check to ensure the items are not damaged or malfunctioning. (3point)

Test II Choose the best answer (5pointeach questions)

1. Which one is the Checking process of incoming stock?
 - A. Check products are not damaged
 - B. . Notify your accounts payable department
 - C. Allocate storage space for goods
 - D. Match the delivery to a purchase order
 - E. ALL
2. Which one is the necessary things ensure you record when delivery new goods?
 - A. The date and time goods arrived
 - B. the name of the delivery partner and driver
 - C. Check off quantities and description of goods against purchase order
 - D. Note any discrepancies
 - E. Names of the personnel who performed these checks
 - F. None

Score = _____
Rating: _____

Note: Satisfactory rating ≥ 7.5 points Unsatisfactory - below 57.5points

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You can ask you teacher for the copy of the correct answers.

Information Sheet -5	Inspecting and recording items for damage, quality, use-by dates, breakage or discrepancies
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5.1 Inspecting and recording items for damage, quality, use-by dates, breakage or Discrepancies Record stocks

Never accept a delivery without doing a visual inspection unless you have signed for it and added. The stock delivered into the property should be checked against the delivery documentation for:

- **Damage:-** Make sure there are no leaking containers, no broken bottles, labels are not missing and seals are intact
- **Quality:** - Make sure all food is fit for human consumption, to ensure items are of the correct grade or year or style. Ensure items feature the required/ordered characteristics and/or classifications and the required/expected attributes are present
- **Type and brand:** – to ensure items delivered match items listed on the paperwork, and to verify the items meet the needs/requirements of the business
- **Quantity:** – checking to make sure all the items listed on delivery documentation has been supplied
- **Use-by dates:** – to ensure the items are not out of date, to verify items have not exceeded „best before“ dates, and to ensure items have sufficient shelf-life left
- **Discrepancies:** These are differences between what was ordered and what was delivered, and differences between what was delivered and what was listed on the accompanying documentation.

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- You should also check to ensure the delivery does not bring in pests and rodents, such as cockroaches and mice.

Self-Check – 5	Written test
----------------	---------------------

Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: say True /False

- You should check to ensure the delivery does not bring in pests and rodents, such as cockroaches and mice.(3point)
- Discrepancies mean the differences between what was ordered and what was delivered.(2point)

Test II Choose the best answer (5pointeach question)

- The stock delivered into the property should be checked against the delivery documentation for:
 - Damage
 - Quality
 - Type and brand
 - All
- Make sure there are no leaking containers, no broken bottles, labels are not missing and seals are intact. It refers-----
 - Quality
 - Damage
 - Best before" dates
 - All

Answer sheet

Score = _____
Rating: _____

———— **Note: Satisfactory rating ≥7.5points** ———— **Unsatisfactory - below 7.5points** ————

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You can ask your teacher for the copy of the **correct answers**.

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Information Sheet 6	Recording stock levels and store stock systems
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6.1. Recording stock levels and store stock systems

6.1.1 Stock Recording Systems

A store ledger or system is a manual or computer **record** of the raw materials and production supplies stored in a production facility. It is maintained by the person responsible for these assets, such as the warehouse manager.

A. Computerized systems

Larger properties or organizations with large stock turnover rates tend to use a computerized stock control/management system. They may use an „off-the-shelf“ commercially available software package but often use one based on such a package but which has been modified to suit the needs of the individual business taking into account the type of business, what it sells, the number of revenue departments, volume of stock and number of different stock lines. An electronic (computer-based) stock control system may be integrated with point-of-sale equipment (such as registers/terminals) and accounting software for payment of accounts and generation of invoices. The systems commonly used have been developed for the hospitality industry and are normally supplied with. User training where experts from the company supplying the system provide face to face, on-site training

B. Paper-based systems

Properties operating a paper-based stock control system will use the following internally generated documents as the basis for their system:

- Purchase orders
- Bin cards

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- Requisition forms
- Internal transfer sheets
- Sales dockets and cash register audit rolls/tapes recording revenue earned
- Checks recording payment for stock received.

6.1.3 Stock levels

Stock levels need to be monitored to ensure the physical stock-on-hand does not exceed house limits. All venues will want to make sure they do not have „too much“ stock-on-hand at any one time. Most properties will want to take delivery of stock, sell it/use it and receive payment for it before they have to pay for it. Many properties will set a numerical minimum, maximum and re-order stock level for items to help in this regard. The minimum stock level is the level below which stock under any circumstances must not fall. The maximum stock level is the most of any item to be in store at any time.

The re-order stock level is the stipulated level stock must fall to, before a new stock order can be triggered/placed.

❖ Monitor stock levels

- Use-by dates
- Where items have use-by dates, it is illegal to use this food or beverage after the stated date because there may be a food safety risk.
- Best-before date

If a food or beverage has a best-before date, this means the product will lose some of its quality after the given date but will not present a health hazard/food safety risk. Items can be legally and safely used after the „best-before“ date.

❖ The recording of stock movements is an important part of Stock Control. Stock Recording Systems should be in place e.g.

- Bin Cards for each item of stock held, recording all stock removed and added

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- Stock Record Cards (which will also show prices of receipts and issues of stock)
- Computers Spread sheet showing all movement of stock
- The type of production process
- ❖ The nature of materials:
 - E.g. are they flammable or not?
 - Are they perishable?
- ❖ The time taken to transport the materials from the stores to the production cost centers. How and where stock is stored will depend upon:
 - The weight of the goods
 - The bulkiness of the goods
 - The risk of physical deterioration
 - The risk of theft
- ❖ Physically checking your stock is necessary to ensure that stock records are accurate and as a deterrent against theft. Stock taking can be:
 - Periodic i.e. annually
 - Perpetual i.e. ongoing where the balance of stock is updated after every receipt and issue
 - Stock Levels advantage and dis advantage
- ❖ There are disadvantages in having too much stock or too little stock .Overstocking causes:
 - High storage costs
 - Cash being paid out before it is necessary
 - High risk of deterioration or obsolescence
- ❖ Under stocking causes:
 - Running out of stock and holding up production
 - Customers going elsewhere if production is halted

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Self-Check – 6	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: True /False

1. There are disadvantages in having too much stock or too little stock.(3point)
2. Physically checking your stock is necessary to ensure that stock records are accurate and as a deterrent against theft.(2point)

Test II Choose the best answer (5point each question)

1 Overstocking causes:

- A. High storage costs
- B. Cash being paid out before it is necessary
- C. High risk of deterioration or obsolescence
- D. all

2 Before a new stock order can be triggered/placed Monitored

- A. Use-by dates
- B. Best-before date
- C. Bin cards
- D. all

Score = _____
Rating: _____

Answer sheet

Note: Satisfactory rating ≥ 7.5 points Unsatisfactory - below 7.5 points

You can ask you teacher for the copy of the correct answers.

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Information Sheet 7	Rotating stock and storing FIFO principle
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7.1 Rotating stock and storing FIFO principle

To rotate stock means to arrange the oldest units in inventory so they are sold before the newer units. For example, a grocery store will restock its shelves by putting the oldest units in the front part of the shelves. The newest units will be placed in the back of the shelves. The hope is that the customer will select the most convenient (older) units from the front of the shelf. It is important to rotate stock in all areas of retail display area, warehouse, factory, etc.

The reason to rotate stock is to reduce the losses from deterioration and obsolescence. Ideally, when a company rotates its stock the units are *physically flowing* first-in, first-out (FIFO).

However, in the accounting for the cost of inventory and the cost of the goods sold, the company may use a *cost flow assumption* which is different from the flow of the physical units. For example, a U.S. company may use the last-in, first-out (LIFO) *cost flow assumption* even though it diligently rotates its stock of goods. It is standard procedure all stock delivered into a venue needs to be rotated so the older stock is used before the newer stock.

7.1.1 The Importance of stock rotation

- ❖ Stock rotation must be applied to help avoid situations such as:
 - Stock loss due to items becoming out of date stock.
 - Stock looking old and tired by virtue of spending too long in storage. This stock is unattractive and customers will not buy it.
 - Damage to stock or a reduction in quality that may occur if stock spends excessive time in storage. The longer an item spends in storage the greater the risk of damage to it.
- Does stock rotation apply to all stock?

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Generally speaking, yes. However there are limited instances where certain products may be bought with the deliberate intention of not rotating them.

For example: Some wines may be bought and cellared for future use as a specific strategy to increase their value Some meat may be purchased and deliberately kept to „age“ it.

7.1.2 FIFO principle Stock rotation options

The four stock rotation options are:

- First In, First Out (FIFO)
- First In, Last Out (FILO)
- Last In, First Out (LIFO)
- Last In, Last Out (LILO).

FIFO, First-In, First-Out, is important for companies that distribute products with expiration dates or perishables, such as pharmaceuticals, food, and beverages. It's a safe practice that ensures your products will not expire or go bad. With FIFO, the oldest products are used or picked first, ensuring product quality and safety. FIFO works for items in any type of packaging, whether it's a can, bottle, or carton. FIFO can be used for fresh, frozen, or canned items as well. It's important for good stock rotation to use the oldest stock first. When used correctly, the FIFO rotation method ensures companies are serving safe products and reducing spoilage.

LIFO: The **last in, first out (LIFO)** method assumes the reverse of the FIFO method: The products most recently purchased are used first. The value of inventory is represented by the unit cost of items in inventory the longest. LIFO assumes that the last items put on the shelf are the first items sold. Last-in, first-out is a good system to use when your products are not perishable or at risk of quickly becoming obsolete.

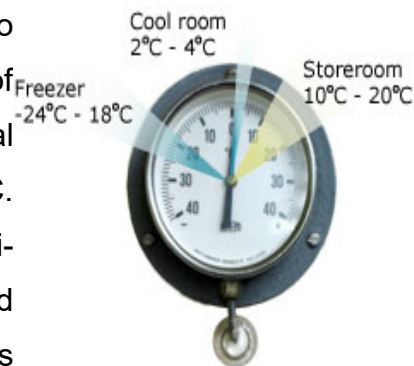
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Using LIFO, if the last units of inventory bought were purchased at higher prices, the higher-priced units are sold first, with the lower-priced, older units remaining in inventory. This increases a company's cost of goods sold and lowers its net income, both of which reduce the company's tax liability. This makes LIFO more desirable when corporate tax rates are higher.

7.1.3 Storage principles

A. Temperature

Temperature is very important when it comes to food storage, and you will often find lots of thermometers around the storerooms. The ideal storeroom temperature is between 10 and 20°C. This applies to both non-perishable and semi-perishable storage areas. The cool room and freezer are of course different. Most cool rooms operate at between 2 and 4°C, and most freezers at between -18° to -24°C.



It's not usually necessary to have storerooms completely insulated or equipped with their own air-conditioning. You just need to know how to make best use of your storage space by being aware of how different commodities behave under varying conditions.

You must take special care to avoid extremes of temperature, because large fluctuations usually cause deterioration and spoilage. Apart from electrical and mechanical failures, lack of or malfunctions in ventilation can cause local hot spots which will raise the temperature too much in certain areas.

You also have to look after your own health. Working in the cool room or freezer for long periods of time puts a significant strain on your body and you can quite

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easily become ill. That is why we have a coat rack just outside the cool room door and recommend that you wear gloves when handling frozen food.

B. Humidity

Humidity is another thing that needs to be considered in the storeroom. The humidity in the dry store areas should be between 50% and 60%. If the humidity gets too high, when the air cools it will release this excess moisture in the form of water droplets, which end up covering the walls and floor of dry store rooms. This can then lead to moisture damage.

C. Rotation

Stock rotation is another important storage principle. Stock rotation is where you put all new stock to the rear or underneath already stored stock, so that existing stock is used first. This prevents stockpiling older supplies which may then deteriorate or exceed their used by date. This process is also known as the F.I.F.O 'First In, First Out' method.

D. Position

Position is also important when storing stock, particularly when storing stock on shelves. Heavy items should be placed on the bottom shelves. Not only does this mean less lifting, but it also prevents the top shelves from becoming top heavy and unstable.

Raw and cooked ingredients should be stored separately, and never on the same tray. Do not place raw meats above raw or cooked foods or desserts as the meat juices may drip and contaminate food on the shelf below.

E. Labelling

This may not sound too important, but it is. You need a good system of labelling for many of your stock items, particularly frozen items as many of these look the same. You should also label the shelves.

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Labels not only allow you to identify what the commodity is but they also allow you to record information such as use by dates and supplier details.

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Self-Check – 7	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I. Say true or false

1. The standard procedure all stock delivered into a venue needs to be rotated so the older stock is used before the newer stock. (2point)
2. FIFO, First-In, First-Out, is important for companies that distribute products with Expiration dates or perishables. (3point)

Test II. Choose the best answer (5point)

1. The products most recently purchased are used first.it means.
A. LIFO B. FIFO C. LILO D. ALL

Test II Short answer

1. Define the advantage of stock rotation? (3point)
2. What is the difference between LIFO and FIFO? (2point)

Score = _____
Rating: _____

Answer Sheet

Note: Satisfactory rating ≥ 7.5 points Unsatisfactory - below 7.5 points

You can ask you teacher for the copy of the correct answers.

Name: _____ Date: _____

1 _____

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2

Information Sheet -8 Dispatching the Stock to appropriate area

8.1 Dispatching the Stock to appropriate area

once stock has been received, it must then be transported to the appropriate storage or operational area, as required. All items should be transported promptly, safely and without damage.

8.1.1 Importance of Dispatching the Stock to appropriate area

Stock should be promptly moved from the delivery area in order to:

- Allow space for further incoming items to be unloaded/delivered. The delivery area is a bottleneck for stock movement and can quickly become chaotic if stock is not moved quickly through the area.
- Remove potential hazards. Stock left lying around presents a tripping risk.
- Minimize the chance of theft. Quickly securing stock in its appropriate storage area greatly reduces the likelihood of theft. Remember members of the public, other delivery drivers, and staff all has the potential to steal stock.
- Reduce the likelihood of damage to products. Cartons and items in a cluttered and busy receivable area can suffer more damage the longer they are left there.
- Eliminate confusion regarding stock checks and counts. It can be difficult to distinguish different orders when the receivable area is full or cluttered.
- Maintain the safety of food. Refrigerated and frozen food must be stored under appropriate conditions, or taken as soon as possible to the areas/kitchens where it will be used.

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The following are some of the standard procedures when dispatching supplies from the storage site:

- Products should spend as little time as possible in storage; hence the rotation of the stocks on the basis of "first in, first out". The items that have been in the warehouse longest should be placed in the front rows of the storage racks so they can be distributed first, and the items that come in later are to be placed at the back, rotating them to the front as deliveries are made;
- The same principle applies to products with an expiry date: the first to be dispatched are those nearest their expiry date;
- A dispatch can only be carried out with an official authorization document that has been signed by the person authorized to do so.
- The same procedure of physical and documentary verification that was carried out when goods entered the warehouse must be carried out when they leave the warehouse, to make sure that the supplies that are being delivered correspond to the packing list or other identification documents;
- Every dispatch must be recorded so it can be withdrawn from the inventory records.

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Self-Check – 8	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I. Say true or false

1. Once stock has been received, it must be transported to the appropriate storage or Operational area, as required. (3point)
2. A dispatch can only be carried out with an official authorization document that has been signed by the person authorized to do so.(2point)

Test II. Choose the best answer (5point each question)

1. Importance of Dispatching the Stock to appropriate area.
 - A. Allow space for further incoming items to be unloaded/delivered.
 - B. Remove potential hazards
 - C. Maintain the safety of food
 - D. ALL
2. The standard procedures when dispatching supplies from the storage site:
 - A. The same procedure of physical and documentary verification that was carried out when goods entered the warehouse.
 - B. The same principle applies to products with an expiry date: the first to be dispatched are those nearest their expiry date.
 - C. Products should spend as little time as possible in storage.
 - D. None

Answer sheet

Score = _____
Rating: _____

Note: Satisfactory rating \geq 7.5 points Unsatisfactory - below 7.5

You can ask you teacher for the copy of the correct answers.

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Information Sheet 9	Applying stock price and code labels
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9.1 Applying stock price and code labels

- Exactly what constitutes a „label“ varies. There are three common, generic styles of labels:
 - ✓ An adhesive label peeled from a roll of pre-printed labels
 - ✓ A computer-generated „document“ printed out from the stock management system
 - ✓ A simple hand-written note or adhesive label with the relevant information written on the label with a marking pen.
- Supplementary reasons labels are used on stock items. Labels will mainly serve to identify the item but information on the label may also include:
 - ✓ Directions to staff – “Use this first”, “Check with Graham before using”
 - ✓ Advice to staff – “Last one – no more being ordered”
 - ✓ Allocation of items – “For use by Kitchen/John Barnes only”.

Most stock delivered to a venue will already be labelled sufficiently for the purposes of storage and general use of the item. Where items are delivered without some form of appropriate identification, wrapping or labelling, or where you need to take individual items out of packets, cartons or wrapping you may need to provide your own labels for these items.

9.1.1 Labelling requirements

Activities involved in labelling stock can include:

- Physically placing existing labels on storage containers and shelving in order to
 - ✓ Identify the stock items
 - ✓ Display delivery date
 - ✓ name of product and a description e.g. what is contained in cooked items

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- ✓ date of delivery
- ✓ use-by date
- Preparing hand-written and/or computer-generated labels and attaching them to individual stock items using electronic bar coding and labelling equipment and attaching labels to:
 - ✓ Shelves
 - ✓ Containers
 - ✓ Individual stock items
- Observing food safety requirements in relation to the labelling of food such as:
 - ✓ Labels, tags or spikes must not make direct contact with food
 - ✓ Ensure day/date and time of delivery is noted on label
 - ✓ Any re-packaged food items must be labelled with details of the original package/item.
- Labels for stock items are usually positioned immediately above or below the item/shelf. In some cases a label may actually be attached to the item itself. The primary purpose of clear and accurate labelling is to identify clearly the items in stock; on the shelf or in other storage areas. For example, it is virtually impossible to visually differentiate between:
 - ✓ Single bed sheets
 - ✓ Double bed sheets
 - ✓ Queen-size bed sheets
 - ✓ King-size bed sheets

When they are folded and sitting on a shelf. Appropriate labelling overcomes this problem helping staff to easily identify and access the correct size sheet and also helps with the placement of stock on shelves or into storage bins.

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Self-Check – 9	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I .Say true or false

- Labels for stock items are usually positioned immediately above or below the item/shelf. (2point)

Test II Choose the best answer (5point each question)

- Physically placing existing labels on storage containers and shelving in order to
 - Identify the stock items
 - Display use-by date
 - Delivery date
 - Name of product and a description
 - none
- The importance of labeling
 - Directions to staff
 - Allocation of items
 - Advice to staff
 - ALL

Item III short answer *question*

- What is the advantage of stock labeling?(2point)
- What is the requirement of stock labeling?(2point)

Answer Sheet

Name: _____ Date: _____

1. _____

2. _____

Note: Satisfactory rating - ≥8 points	Unsatisfactory - below 8 points
Score = _____	
Rating: _____	

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LG #45	LO #2 Rotate stock
Instruction sheet	
<p>This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:</p> <ul style="list-style-type: none">• Carryout stock rotation procedures• Reforming store code checking and reporting procedures• Placing merchandise fully-stocked display appearance and promote sales.• Placing excess stock in storage or disposing.• Maintaining safe lifting, shifting and carrying techniques <p>This guide will also assist you to attain the learning outcomes stated in the cover page. Specifically, upon completion of this learning guide, you will be able to:</p> <ul style="list-style-type: none">• Carryout stock rotation procedures• Reforming store code checking and reporting procedures• Place merchandise fully-stocked display appearance and promote sales.• Place excess stock in storage or disposing.• Maintain safe lifting, shifting and carrying techniques	

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Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below.
3. Read the information written in the information Sheets
4. Accomplish the Self-checks
5. Perform Operation Sheets
6. Do the “LAP test”

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Information Sheet 1	Carryout stock rotation procedures
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1.1 Carryout stock rotation procedures

Stock rotation is the **process** of organizing inventory to mitigate **stock** loss caused by expiration or obsolescence. Basic **stock rotation** entails moving products with impending sell-by dates to the front of the shelf and moving products with later expiration dates to the back.

To rotate stock means to arrange the oldest units in inventory so they are sold before the newer units. For example, a grocery store will restock its shelves by putting the oldest units in the front part of the shelves. The newest units will be placed in the back of the shelves. The hope is that the customer will select the most convenient (older) units from the front of the shelf. It is important to rotate stock in all areas: retail display area, warehouse, factory, etc. The reason to rotate stock is to reduce the losses from deterioration and obsolescence. Ideally, when a company rotates its stock the units are physically flowing first-in, first-out (FIFO). However, in the accounting for the cost of inventory and the cost of the goods sold, the company may use a cost flow assumption which is different from the flow of the physical units. For example, a U.S. company may use the last-in, first-out (LIFO) cost flow assumption even though it diligently rotates its stock of goods.

1.1.1 Five benefits of FIFO include:

1. **Reduce spoiled and expired products:** When you ship out the oldest stock first, you increase the chance that the item will sell before it reaches its expiration date. This can help businesses reduce the quantity of inventory that remains unsold, helping them improve profits.
2. **Reduce obsolete inventory:** Obsolete inventory refers to products that are outdated and no longer useful to consumers. When products are moving in

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and out of the warehouse quickly, you can reduce the chances of an item becoming obsolete before it is ultimately sold to a consumer.

3. **Make quality control easy:** Another benefit of using FIFO is that quality control becomes simple. Shipping products in the order you get them makes it easy to track deliveries. If a product is bad, you know what supplier brought it in and when it was received.
4. **Minimize the impact of inflation:** Inflation refers to the increase in prices over time. FIFO can reduce the impact of inflation on suppliers, retailers and ecommerce businesses. Because the old product is the first sold, it might have cost less to make than newer inventory. This keeps prices accurate and helps retailers and ecommerce businesses manage inventory and profits.
5. **Keep current inventory value:** Using FIFO procedures in your warehouse can help suppliers, retailers and ecommerce businesses keep current with inventory value. As items purchased are pulled from shelves, the inventory system includes the most recently purchased inventory. This helps make sure that the inventory value and cost of goods sold is reflective of current market prices.

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Self-Check 1	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

I .Say true or false

- 1 Obsolete inventory refers to products that are outdated and no longer useful to consumers.(2point)
- 2 Inflation refers to the increase in prices over time.(3point)
- 3 Stock rotation is the process of organizing inventory to mitigate stock loss caused by expiration or obsolescence. (3point).

Test II. Choose the best answer (4point each)

1. The benefits of FIFO include.
 - A. Reduce spoiled and expired products
 - B. Keep current inventory value
 - C. Minimize the impact of inflation
 - D. ALL

2. Using FIFO procedures in your warehouse can help suppliers, retailers and ecommerce businesses keep current with inventory value. It refers ----- .
 - A. Reduce spoiled and expired products
 - B. Keep current inventory value
 - C. Minimize the impact of inflation
 - D. all

Score = _____

Note: Satisfactory rating - ≥8 points		Unsatisfactory - below 8 points	
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Information Sheet 2	Reforming store code checking and reporting procedures
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2.1 Reforming store code checking and reporting procedures

Any unique identifier can be a store code. A store code can be anything from the name of a place to a random number, as long as it stays the same to refer to that location. Include your brand name in your store code to avoid confusion between spreadsheets (for separate business or personal accounts). Store code and material identification has witnessed great transformation in recent times due to technological advancement. Consequently, the risk of store personnel has become far easier, more efficient, and cost effective and all major operations are executed with high level of accuracy. Store code and material identification is an aspect of store management that enjoys this transformation. The process of indexing, coding and sorting has improved significantly with computer system application across different purchasing organization. Materials brought into stores are immediately assigned system code and file names for easy identification. This is necessary to avoid problems of multiplicity of inappropriate or incorrect names assigned to materials. Invariable, the vocabulary of identification and coding are separate concepts that are independent and mutually exclusive. Although, it is possible to have a good vocabulary in an organization not using a coding system.

Identification of material successfully in inventory management is greatly aided by a logical system of classification covering all inventory items for the purpose of code. Identification is the process of systematically defining and describing all items in store. The preparation and maintenance of store vocabulary is essentially

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or technically efficient. Vocabulary lies with the stores managers and his team who is responsible for the managing efficiency.

Vocabulary includes the development of a technical for ensuring that words describing the articles or materials are sequence of importance. Whether or not a code system is at use, this technique should be employed. An efficient code system assists the store personnel in the controlling of the stock and easy identification of materials without wasting time. And vocabulary on the other hand is the transfer to writing of the things which has been recognized.

Unfortunately, the users from the various functions department tend to draft the description according to their use of the items. You've got a collection of new products that you're keen to enter into your inventory management system. These products may also be listed through other channels, such as your e-commerce store, or linked to your point-of-sale in your bricks and mortar shop. You may be wondering what will be the best way to track these items is - how many of each size and colours are in the store or warehouse? If you're not familiar with what a SKU (Stock Keeping Unit) is, read on.

Why do skus matter?

Good product codes (often referred to as skus) are keys to maintaining accurate stock control within your business and ensure that your staff can find and sell the correct product. A well-considered alphanumeric SKU is generally more memorable than a barcode, which is a long string of numbers that is not unique to your business. Consistent format and length across your skus helps with product segmentation, makes your invoices look neat and professional, and means customers can re-order the same product easily by quoting a product code unique to your store. Clever abbreviating of product details in an alphanumeric code means it is easy to add new products to your system in the future if a supplier expands their range.

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In this blog, we will explore some of our top tips and tricks for creating meaningful product codes.

1. Product codes must not start with 0! When you import product lists into your new inventory system, you will usually be asked to upload a Microsoft Excel CSV file (.csv). Microsoft Excel drops the leading 0 on any number that starts with 0 e.g. "0512" becomes "512", meaning the product code has changed and is no longer accurate.

2. Keep it short and sweet, but not too short! We recommend using skus that are a minimum of 4 characters (for smaller inventories) and a maximum of 12 characters. Longer product codes are harder to print out on product labels and may get split onto two lines on an invoice. A SKU of 1-3 digits may be mistaken for a quantity value.

3. Try not to use your supplier's product code as your product code. If the supplier changes their product code in the future, you will be left with a number that does not have any meaning to your organization and it will make reordering more difficult with both your suppliers and customers. Create a SKU that is meaningful for you and your staff.

4. We recommend using uppercase letters, numbers and dashes (-) only in your product code. Special characters tend to cause issues when syncing products across multiple sales channels and most often are not translated correctly in Microsoft Excel when exported to a spreadsheet. It is good practice to use both letters and numbers in a Product Code, as there can be no possible way that the value could accidentally be altered.

5. Consider using a few common letters as a prefix to categories and group products. If we sell coffee, biscuits and tea:

- All products in the "Coffee" group will start with "COF"
- All products in the "Biscuits" group will start with "BIS"
- All products in the "Tea" group will start with "TEA"

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If we have 20 different flavors of biscuits, we can assign a sequential number to each different type of biscuit.

- BIS-01
- BIS-02
- BIS-03 etc.

This also means if staffs are looking up codes, it will be faster for them to find products within a certain group.

6. Use suffixes separated by dashes to identify product variants.

Clever use of dashes can be used to denote product variants such as size or color. If we've got a t-shirt, we might start with "TEE01" as the base part of the SKU. We then add a dash and a two-letter colours code:

E.g. .TEE01-RD - A red t-shirt TEE01-BL - A blue t-shirt

Keep the colours code to two or three letters/numbers maximum where possible. These t-shirts come in 3 sizes, small, medium and large. We will add another dash and the size code: TEE01-RD-S TEE01-RD-M TEE01-RD-L TEE01-BL-S TEE01-BL-M TEE01-BL-L

Now we have all the codes generated for our six unique t-shirts.

7. Set up a product code naming convention, and stick to it! Using the example outlined in point 6, if in the future our supplier starts stocking yellow t-shirts in the design "TEE01", we can easily add "TEE01-YL" as a new SKU to keep the product code consistent with our existing products. If more than one staff member is responsible for product entry, ensure there is a checklist and instructions for the correct formatting of new product codes.

8. Make all your skus the same length. Following on from the last point, a great way of making our skus look more consistent is to make them the same length, and if we do use dashes in the skus, make sure these are in the same place:

TEE01-YL - a yellow T-shirt JUM01-BL - a blue jumper BEA02-PK - a pink beanie

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9. Try not to use letters that could be mistaken for numbers, such as "O" and "I". This may result in products not being able to be found in the system, or incorrect product codes given out to customers.

10. Don't use letter or number sequences that could be mistaken for a date value. When exporting a product list to Microsoft Excel, SKU values such as "AUG-30" could be read as a date when opening the product file meaning this SKU may be unexpectedly changed to "30/08".

Using these tips to streamline your inventory catalogue can assist with:

- Tracking stock levels more accurately
- Easier reordering of stock
- Making your sales and fulfillment processes more efficient
- Improved assisting with customer enquiries and orders
- Streamlining your invoices to look neat and professional
- Adding new products in the future

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Self-Check – 2	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answer

I .Say true or false

- 1 Any unique identifier can be a store code.(2point)
- 2 Good product codes (often referred to as skus) are keys to maintaining accurate stock control within your business.(3point)
- 3 Identification is the process of systematically defining and describing all items in store.(2point)

I. Choose the best answer (5point each question)

1. The advantage of stock code and identification goods.
 - A. Tracking stock levels more accurately
 - B. Easier reordering of stock
 - C. Making your sales and fulfillment processes more efficient
 - D. Improved assisting with customer enquiries and orders
 - E. None
2. The necessary steps to give stock code and goods identification?
 - A. Product codes must not start with 0!
 - B. Don't use letter or number sequences that could be mistaken for a date value
 - C. Use suffixes separated by dashes to identify product variants
 - D. Consider using a few common letters as a prefix to categories and group product
 - E. All of the above

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Test II: Short Answer Questions

1. Define the advantage of store code? (2point)
2. List the steps of give stock code? (3point)

Answer Sheet

Name: _____ Date: _____

1. _____

2. _____

Score = _____
Rating: _____

Note: Satisfactory rating - ≥ 11 points Unsatisfactory - below 11 points

You can ask you teacher for the copy of the correct answers.

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Information Sheet 3	Placing merchandise fully-stocked display appearance and Promote sales.
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3.1 Placing merchandise fully-stocked display appearance and promote sales.

When it comes to visual merchandising, retail displays are where most of the action happens. Knowing the different types of retail displays and how they are used across a variety of product categories is critical to making an impact on sales

3.1.1 Types of stock display and advantages

1. Retail Display

A retail display is anything in a store that houses or promotes your product. A visual merchandising strategy focuses heavily on the appearance of retail displays, as they are often the first point of contact between your product and the shopper.

Any brand that sells at retail will use retail displays. Visual merchandisers are usually the ones to design and implement retail displays and are also in charge of making sure the displays maintain their appearance over time.

2. Standalone POP Display

A POP display, also known as a point of purchase display, is any store display that draws attention to your product.

A standalone display is a type of POP display that exists separately from traditional aisle shelves. These displays often appear in the middle of large store aisles called “action alleys,” or anywhere else in the store where there is open space. Standalone displays play a huge role in a brand’s visual merchandising strategy and should be carefully designed to stand out within a retailer.

3. Dump Bins

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Dump bins certainly live up to their name they are literally giant bins in stores that are commonly stocked with individually packaged products. You'll often see them full of candy other small products that provoke impulse buys.

A great advantage of dump bins is that they are standalone displays, and can be strategically placed to be seen or interacted with from all angles. They are also usually made out of cardboard or are otherwise customizable, so bins are not only a great opportunity to get creative with how you project your brand's image, but they're also easy for your field team or distributor to ship and set up.

4. Freestanding Displays

Freestanding displays are similar to dump bins in that they are also standalone displays and can be interacted with from 360 degrees. That being said, they are more organized in appearance than dump bins, and often neatly display slightly larger products on shelves or hooks. Like dump bins, freestanding displays are also commonly made out of cardboard, so they are a great chance to experiment with some attention-grabbing shapes or designs.

5. Entryway Displays

Displaying your products near entryways can put your brand at the top of shoppers' lists before they even see your competitors. Entryway displays are effective at encouraging impulse buys, as customers at the beginning of their shopping trip are entering the store ready to spend money. If you're lucky enough to be in a place with nice weather, setting up an outdoor entryway display is a great way to catch shoppers' attention before they even get inside.

6. Gondola Displays

Gondolas are two-sided, standalone shelving units that also appear in larger, more open areas of a store. They have adjustable shelves, which makes them customizable to accommodate different sized products. While they typically are made with steel frames and pegboard, there are options for brands to promote their product through graphics and an attractive color scheme

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7. Window Displays

Window displays, also known as window dressings, are exactly what they sound like product displays that are set up in the window of a retailer. These displays are extremely lucrative as they represent the retailer and can be the deciding factor on whether a shopper enters the store in the first place. If given the opportunity to occupy a window display for your product, it is imperative to create a visually appealing design that will positively represent your product and the retailer.

Banner stands are standalone signage that brands can place throughout the store to feature their product or announce a promotion. Banner stands are inexpensive, mobile, and effectively catch shoppers' attention. When creating a banner stand, always remember that less is more you don't want to overwhelm the shopper, so avoid using too many colors or providing more written information than what the shopper would be willing to read. If your banner stand is not located next to your product, you can include a message within the graphic on where it can be found in the store.

8. Retail Shelving Display:

Shelving displays are any type of display that exists on a traditional store shelf. They utilize the space provided by these shelving units to showcase products, feature signage, and interact with shoppers.

9. End Cap Displays

End cap displays are the shelves at the end of a two-sided retail shelf which the shopper passes by when going from one aisle to another. Like free standing displays, end caps allow you to place your product in relevant areas beyond typical aisle shelf space. They also give you a prime location to attract a lot of eyes shoppers walking through action alley can see your products without even going down the aisle, giving you a major advantage over your competitors.

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Self-Check – 3	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I Say true or false

1. A retail display is anything in a store that houses or promotes your product.(2points)
2. Shelving displays are any type of display that exists on a traditional store shelf.(3points)

Test II choose the best answer. (3points)

- 1 _____ is any store display that draws attention to your product.
- A. End Cap Displays
 - B. Standalone POP Display
 - C. Retail Shelving Display
 - D. All

Test 1.Short Answer Questions

1. Define the advantage of store display to promote sales? (2point)
2. List the steps of displays merchandise or stock (2point)

Answer Sheet

Name: _____ Date: _____

1. _____

2. _____

You can ask you teacher for the copy of the correct answers.

Score = _____
Rating: _____

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Note: Satisfactory rating - ≥ 6 points

Unsatisfactory - below 6 points

Information Sheet 4	Placing excess stock in storage or disposing
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4.1 Identification and disposal of obsolete and surplus stocks

The major causes of obsolete and surplus stocks are the over estimation of requirements, changes in product design, standardization, and bulk purchases.

The following measures are suggested to reduce obsolescence:

- Changes in design and production schedules should be made when stocks are at a minimum level.
- Estimates of requirements should not be based on historical consumption data alone.
- Planning for A and B items must be done more accurately than for C items.
- Discounts should be negotiated only if the additional items are absolutely essential.
- Standardization must be implemented when stocks are low.
- The volume of orders for spare parts should be examined when new equipment is bought. Information on consumption of spares for similar equipment should provide guidance and other organizations may be consulted.
- The following steps should be taken to identify and dispose of useless stocks.
 - a) A periodic review of stocks is carried out to identify slow-moving and non-moving items which need not be kept in stock. Slow-moving items are those which have been kept for at least one year and non-moving items are those which have been kept for two or three years.

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- b) In addition, there may be excessive stocks (which will last for more than a year) of certain items. A list of slow- and non-moving items and excessive stock items should be prepared, indicating the value of these stocks and when they were last issued.
- c) Since the list may include items which could be required in future, it has to be circulated so that all departments can identify items which might be used, items which need modification and items which cannot be used.
- d) It is then necessary to prepare a list of items which cannot be used within the organization.
- e) This list should be sent to similar organizations, suppliers, dealers and other probable users for sale or exchange.
- f) If there is no possibility of sale or exchange, the items may be donated to educational institutions or sold to employees.
- g) Items which cannot be disposed of otherwise should be offered at auction
- h) Proper storage methods
 - Proper stores layout permits easy access to materials, better space utilization and reduced need for handling within the stores; it also minimizes damage, deterioration and pilferage, and permits easy checking. Racks and other facilities are arranged to minimize the distance travelled when materials are received and issued.
 - The method of storage will depend on the size, shape, type and quantity of the item. Optimum space requirements can be worked out for each type of item and matched with the floor layout of the stores to indicate the best arrangement of stocks and placement of facilities. Items requiring specific conditions such as refrigeration should be identified. Items should be grouped according to frequency of use, shape, size, and weight to determine overall layout and storage methods. Fast-moving items are stored nearest to the issue

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window while slow-moving and other items are kept upstairs and on the top or bottom shelves of the racks to save labor cost.

- Some of the rules for developing proper stores layout are as follows.
- Space utilization should be maximized by making full use of the vertical dimension.
- Items should be banded by groups or classes to reserve space for each group.
- Materials should be properly labelled showing class and code to permit easy identification.
- The principle of “first in-first out” will help reduce deterioration, particularly for perishable goods.
- As far as possible binning should facilitate counting of materials.
- Materials should be obtained, stored and issued in unit loads to reduce handling.
- Proper storage and preservation methods should be used for each item. For example, inflammable materials must be stored in tightly closed containers away from the main building.

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Self-Check – 4	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I .Say true or false

1. The major causes of obsolete and surplus stocks are the over estimation of requirements, changes in product design, standardization, and bulk purchases.(3point)
2. The method of storage will depend on the size, shape, type and quantity of the item.(2point)
3. Proper stores layout permits easy access to materials, better space utilization and reduced need for handling within the stores.(2point)

Test II Choose the best answer (5pointeach)

1. The following measures are suggested to reduce obsolescence of stock.
 - A. Standardization must be implemented when stocks are low
 - B. Changes in design and production schedules should be made when stocks are at a minimum level.
 - C. Discounts should be negotiated only if the additional items are absolutely essential.
 - D. ALL
- 2 Some of the rules for developing proper stores layout are?
 - A. Space utilization
 - B. First in-first out principle
 - C. Materials should be properly labelled
 - D. All

Test III short answer question

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1. Define steps should be taken to identify and dispose of useless stocks.(2point)
2. How to Placing excess stock in storage? (3point)

Note: Satisfactory rating ≥ 11 points Unsatisfactory - below 11 points

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = _____
Rating: _____

Name: _____ Date: _____

1. _____

_____.

2. _____

_____.



Information Sheet 5- Maintaining safe lifting, shifting and carrying techniques

5.1 Maintaining safe lifting, shifting and carrying techniques

5.1.1 Lifting and Material Handling

Lifting heavy items is one of the leading causes of injury in the workplace. In 2001, the Bureau of Labor Statistics reported that over 36 percent of injuries involving missed workdays were the result of shoulder and back injuries. Overexertion and cumulative trauma were the biggest factors in these injuries. Bending, followed by twisting and turning, were the more commonly cited movements that caused back injuries. Strains and sprains from lifting loads improperly or from carrying loads that are either too large or too heavy are common hazards associated with manually moving materials. When employees use smart lifting practices, they are less likely to suffer from back sprains, muscle pulls, wrist injuries, elbow injuries, spinal injuries, and other injuries caused by lifting heavy objects.

5.1.2 Lifting principles and lifting stages

1. Preparation

- Before lifting or carrying, plan out your lift. Think about:
 - ✓ How heavy/awkward is the load? Should I use mechanical means (e.g. a hand truck) or another person to help me with this lift? Is it possible to break the load into smaller parts?
 - ✓ Where am I going with the load? Is the path clear of obstructions, slippery areas, overhangs, stairs, and other uneven surfaces? Are there closed doors that need to be opened?
 - ✓ Are there adequate handholds on the load? Do I need gloves or other personal protective equipment? Can I place the load in a container with better handholds? Should another person help me with the load?

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2. Lifting

Get as close to the load as possible. Try to keep your elbows and arms close to your body. Keep your back straight during the lift by tightening the stomach muscles, bending at the knees, keeping the load close and centered in front of you, and looking up and ahead. Get a good handhold and do not twist while lifting. Do not jerk; use a smooth motion while lifting. If the load is too heavy to allow this, find someone to help you with the lift.

3. Carrying

Do not twist or turn the body; instead, move your feet to turn. Your hips, shoulders, toes, and knees should stay facing the same direction. Keep the load as close to your body as possible with your elbows close to your sides. If you feel fatigued, set the load down and rest for a few minutes. Don't let yourself get so fatigued that you cannot perform proper setting down and lifting technique for your rest.

4. Setting Down

Set the load down in the same way you picked it up, but in the reverse order. Bend at the knees, not the hips. Keep your head up, your stomach muscles tight, and do not twist your body. Keep the load as close to the body as possible. Wait until the load is secure to release your handhold.

• Important Things to Remember

- ✓ Use mechanical means (e.g. hand trucks, pushcarts, etc.) when possible for heavier or awkward loads. Remember to obtain training and authorization before using a forklift.
- ✓ It is easier and safer to push than to pull.
- ✓ Keep loads as close to the body as possible and do not twist while lifting, carrying, or setting down a load. Nose, shoulders, hips, and toes should all be facing the same direction.

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- **Minimize reaching.**

- ✓ As a general rule, bend at the knees, not the hips.
- ✓ Get help when needed. Do not lift or carry things you don't feel comfortable with, no matter how light the load.
- ✓ Plan ahead for all parts of the lift: lifting, carrying, and setting down.
- ✓ Try to utilize proper handholds while lifting. If an item does not have a good handhold, think of ways to remedy this, such as placing the item in a container with good handholds, creating a safe and proper handhold with an appropriate tool, etc.
- ✓ Use personal protective equipment where needed, such as gloves with good grip and steel-toed boots where appropriate.
- ✓ Implement rest breaks and job rotation for frequent and/or heavy lifting.
- ✓ Place items to be lifted within the "power zone". The power zone is close to the body, between the mid-thigh and mid-chest of the person doing the lifting. This is the area where the arms and back can lift the most with the least amount of effort.

- **Weight of Objects**

Heavier loads place greater stress on muscles, discs, and vertebrae. Where possible, use mechanical means such as forklifts or hand trucks to transport heavy items. Ramps can be helpful in moving heavy items from one level to another. Materials that must be manually lifted should be placed at "power zone" height: about mid-thigh to mid-chest of the person doing the lifting. Ensure that proper lifting principles (see above) are used.

Try to order supplies in smaller quantities and/or break loads up into smaller, lighter quantities where possible. Is the container itself heavy? Perhaps a smaller or lighter container is available. Limit weight you lift to no

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more than 50 pounds. When lifting loads heavier than 50 pounds, use two or more people to lift the load.

- **Awkward Postures**

Bending while lifting causes several problems for the back. It adds the weight of the upper body to the weight of the object being lifted. Bending and/or reaching moves the load away from the body and allows leverage to significantly increase the effective load on the back, leading to stress on the lower spine and muscle fatigue. Carrying loads on one shoulder, under an arm, or in one hand creates uneven pressure on the spine. Move items close to the body and use the legs when lifting from a low location to minimize bending and reaching.

Ensure proper housekeeping is taking place so that you may get as close to your lifting loads as possible. Store and place materials that need to be manually lifted at the “power zone”: mid-thigh to mid-chest height. This can be accomplished by placing objects on shelves, tables, racks, or stacked pallets; or by using ladders or aerial lifts where necessary to elevate you and minimize overhead reaching.

Roll-out decks in truck beds can be utilized to bring materials closer to the employee and eliminate the need to crawl into the back of a truck. Ensure that proper lifting principles (see above) are used, including avoiding twisting and holding the load close to the body.

- **High-Frequency and Long-Duration Lifting**

Holding items for long periods, even if loads are light, increases the risk of back and shoulder injury since muscles can be starved of nutrients and waste products can build up. Repeatedly exerting, such as when pulling wire, can fatigue muscles by limiting recuperation times. Inadequate rest periods do not allow the body time to recover.

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Plan ahead when beginning works that will require high-frequency and long-duration lifting. This way, the work can be organized in such a way so as to minimize the time workers spend holding loads.

Adequate rest breaks can be planned in, as well as job rotation between employees. This includes both rotating tasks (employees trade off on differing tasks) and team work (two or more employees work together doing different parts of the same activity to reduce strain).

Planning can also include the pre-assembly of work items to minimize the time spent handling them during the actual work.

- **Inadequate Handholds**

Inadequate handholds, such as boxes without handles or oddly-shaped loads, make lifting more difficult, move the load away from the body, lower lift heights, and increase the risk of contact stress and of dropping the load.

Where possible, utilize handholds such as handles, slots, or holes that provide enough room for gloved hands. Try to use materials that are packaged with proper handholds (your supplier may be able to provide different containers), or move materials into containers with good handholds. Wear protective equipment to avoid finger injuries and contact stress. Ensure that gloves fit properly and provide adequate grip. Suction devices are helpful in lifting junction boxes and other materials with smooth, flat surfaces. Other tools may be available that can create temporary handles.

- **Environmental Factors**

Be aware of extreme temperatures that can affect lifting and material handling. For example, muscle flexibility decreases in cold temperatures, and hot temperatures can lead to heat stress. Low visibility or poor lighting increases the chance of trips and falls.

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Do what you can to adjust work schedules to minimize exposure to extreme temperatures or low visibility. Wear appropriate clothing for the temperature in which you will be working.

Drink lots of water to avoid dehydration in excessive heat. Provide proper lighting for areas with low light and try to perform work during daylight hours when possible.

5.1.3 General techniques to lift safely

Everyone lifts, holds, carries, pushes and pulls on a daily basis whether it is during leisure activities or as a part of paid work. Manual material handling involves lifting light, heavy and awkward objects. Safe lifting is a critical aspect of daily activities and should be the focus of any manual material handling.

- Before you lift, remember the following:
 - ✓ Wear supportive shoes;
 - ✓ Use lift assists (hand dollies, carts, lift tables, forklifts);
 - ✓ Carry all movements out horizontally (e.g., push and pull rather than lift and lower);
 - ✓ Always use your body weight and not your feet when pushing;
 - ✓ Try to have most workplace deliveries placed at hip height;
 - ✓ Always keep objects in the comfort zone (between hip and shoulder height);
 - ✓ Keep all loads close to and in front of the body.
 - ✓ Keep the back aligned while lifting.
 - ✓ Maintain the center of balance.
 - ✓ Let the legs do the actual lifting and
 - ✓ Reduce the size of the material to keep it light, compact and safe to grasp.

There is a 10:1 ratio for every lift performed. For example, if an object is 10 pounds, it takes your back 100 pounds of back pressure to pick up the object.

- **Plan the lift**

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- ✓ Size up the load, its weight, shape and position;
- ✓ Determine if the load is too large, too heavy or too awkward to move alone;
- ✓ Get help from a coworker or use a mechanical aid device to help with the lift when necessary;
- ✓ Decide on the route to take;
- ✓ Check for any problems or obstacles such as slippery or cluttered floors;
- ✓ Investigate the location where the load will be placed in order to anticipate any difficulties; and
- ✓ Always exercise or warm-up the back prior to lifting.



Fig 5.1 Plan the lift

Fig 5.2 Squat



• Squat lifting

Squat lifting should be done for a majority of all lifts.

Squat lifting should be performed as follows:

- ✓ Stand as close to the load as possible;
- ✓ Move your feet shoulder width apart;
- ✓ Tighten your stomach muscles so you can tuck your pelvis;
- ✓ Bend at the knees, keeping your back straight and stomach tucked;
- ✓ Get a good firm grip on the load;
- ✓ Hug the load close to the center of your body;
- ✓ Lift smoothly with your legs gradually straightening the knees and hips into a standing position; and

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- ✓ Avoid twisting your body as you lift.

- **Carrying the load**

- ✓ Keep the load close to the center of your body to take full advantage of the mechanical leverage of your body;
- ✓ Do not change your grip on the load unless it is weight supported;
- ✓ Avoid twisting your body without pivoting your feet at the same time;
- ✓ If you must change direction, move your feet in that direction instead of twisting your trunk in that direction;
- ✓ Make sure you can see over the load; and
- ✓ Move carefully toward your destination.

- **Unloading objects**

Unloading objects should be done the same way as lifting objects, but in the reverse order as follows:

- ✓ Slowly bend your knees to lower the load.
- ✓ Keep your back straight and the weight close to the center of your body.
- ✓ Allow enough room for fingers and toes when the load is set down.
- ✓ Place the load on a bench or table by resting it on the edge and pushing it forward with your arms and body and secure the load to ensure that it will not fall, tip over, roll or block someone's way

- **One-arm loads**

One-arm loads are used when carrying items such as pails or buckets.

Lifting and carrying one-arm loads should be performed as follows:

- ✓ Bend the knees and at the waist keeping your back straight.
- ✓ Reach for the load;
- ✓ Grasp the handle of the load firmly;
- ✓ Lift with your legs not your shoulders and upper back; and
- ✓ Keep your shoulders level while switching hands regularly to reduce overexertion on one side of the body while carrying the load.

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- **Team lifts**

Team lifts are used when objects are too heavy, too large or too awkward for one person to lift. Team lifts should be performed as follows:

- ✓ Work with someone of similar build and height, if possible;
- ✓ Choose one person to direct the lift (e.g., "lift on the count of three");
- ✓ Lift with your legs and raise the load to the desired level at the same time;
- ✓ Always keeps the load at the same level while carrying;
- ✓ Move smoothly and in unison and Set the load down together

- **Overhead lifts**

Overhead lifts should be conducted as follows:

- ✓ When lifting or lowering objects from above the shoulders, lighten the load whenever possible;
- ✓ Stand on something sturdy such as a step stool or platform to decrease the vertical distance; and
- ✓ When you are lowering objects from above the shoulders, slide the load close to your body, grasp the object firmly, slide it down your body and proceed with your move.

- **Mechanical aids**

Special lifting equipment such as hand trucks, carts, dollies, forklifts, hoists and wheelbarrows can help move loads when they are too heavy, awkward or a co-worker is not available. Although mechanical aids are used, safe lifting procedures should still be followed by maintaining the natural curvature of the back, using the legs for any lifting that is encountered and avoids twisting the back.

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Fig 5.3 Manual lifting Equipment aids

Mechanical Lifting Aids CITY OF GLASGOW COLLEGE



fig 5.4 Mechanical lifting

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Self-Check – 5	Written test
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Name..... ID..... Date.....

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I .Say true or false

1. Unloading objects should be done the same way as lifting objects.(2point)
2. Team lifts are used when objects are too heavy, too large or too awkward for one person to lift.(2point)
3. Plan ahead when beginning works that will require high-frequency and long-duration lifting.(3point)

Test II Choose the best answer from the given alternative (5 point each question)

1. Which one are Lifting principles and lifting stages?
 - A. Preparation
 - B. Lifting
 - C. Carrying
 - D. Setting Down
 - E.ALL

Test III. Short answer questions

1. List the mechanical aids lifting machine.(2point)
2. Define the Overhead lifts(2point)

Answer Sheet

Name: _____ Date: _____

1. _____

2. _____

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You can ask you teacher for the copy of the correct answers.

Note: Satisfactory rating ≥ 8 points Unsatisfactory - below 8 points

Score = _____

Rating: _____

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Operation Sheet -1 procedure of Squat lifting

Procedure:

Squat lifting should be done for a majority of all lifts.

Squat lifting should be performed as follows:

1. Stand as close to the load as possible
2. Move your feet shoulder width apart
3. Tighten your stomach muscles so you can tuck your pelvis;
4. Bend at the knees, keeping your back straight and stomach tucked
5. Get a good firm grip on the load;
6. Hug the load close to the center of your body
7. Lift smoothly with your legs gradually straightening the knees and hips into a standing position and
8. Avoid twisting your body as you lift.

Operation Sheet 2- procedure of Carrying the load

Procedure:

1. Keep the load close to the center of your body to take full advantage of the mechanical leverage of your body
2. Do not change your grip on the load unless it is weight supported
3. Avoid twisting your body without pivoting your feet at the same time
4. If you must change direction, move your feet in that direction instead of twisting your trunk in that direction;
5. Make sure you can see over the load; and
6. Move carefully toward your destination.

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Operation Sheet 3- procedure of Unloading objects

Procedure:

Unloading objects should be done the same way as lifting objects, but in the reverse order as follows:

1. Slowly bend your knees to lower the load.
2. Keep your back straight and the weight close to the center of your body.
3. Allow enough room for fingers and toes when the load is set down.
4. Place the load on a bench or table by resting it on the edge and pushing it forward with your arms and body and secure the load to ensure that it will not fall, tip over, roll or block someone's way

Operation Sheet 4- procedure of One-arm loads

Procedure:-

One-arm loads are used when carrying items such as pails or buckets.

Lifting and carrying one-arm loads should be performed as follows:

1. Bend the knees and at the waist keeping your back straight.
2. Reach for the load;
3. Grasp the handle of the load firmly;
4. Lift with your legs not your shoulders and upper back; and
5. Keep your shoulders level while switching hands regularly to reduce overexertion on one side of the body while carrying the load.

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Operation Sheet 5- procedure of Overhead lifts

Procedure:

Overhead lifts should be conducted as follows:

1. When lifting or lowering objects from above the shoulders, lighten the load whenever possible
2. Stand on something sturdy such as a step stool or platform to decrease the vertical distance
3. When you are lowering objects from above the shoulders, slide the load close to your body, grasp the object firmly, slide it down your body and proceed with your move.

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LAP TEST	Performance Test
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Name..... ID.....

Date.....

Time started: _____ Time finished: _____

Instructions: Given necessary templates, tools and materials you are required to perform the following tasks within **2** hour. The project is expected from each student to do it.

Task-1 Squat lifting.

Task-2 Carrying the load.

Task-3.Unloading objects.

Task-4. One-arm loads.

Task-5 Overhead lifts.

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<https://www.ogl.co.uk/why-is-stock-control-important-to-a-business>

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