



Canadian
Supply Chain
Sector Council

Conseil canadien
sectoriel de la chaîne
d'approvisionnement

OCCUPATIONAL STANDARD

(For use in the development of supply chain related job descriptions, performance evaluations, career development plans, etc.)

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| Position: | PURCHASING AND INVENTORY CLERK |
| Description of Position (As defined by the CSCSC Stakeholder Community) | <i>Purchasing and Inventory Clerks process purchasing transactions and maintain inventories of materials, equipment, supplies, and products. Depending upon the size and nature of the organization, the duties of Purchasing and Inventory Clerks may either be distinct or overlap in function.</i> |
| Position Development | Progression to supervisory and management positions is possible through experience and with additional training. |
| Required Qualifications: | (Education, Training, Related Work Experience) |
| Education | Purchasing and Inventory Clerks at minimum require a high school diploma or equivalent. |
| Training | Required training includes purchasing training, procurement and inventory management training, and the ability to build, operate, and maintain a computerized inventory and purchasing system. |
| Related Work Experience | Previous supply chain work-related skill, knowledge, or experience specifically in purchasing and/or inventory systems is usually needed. |
| Tasks: | |
| Purchasing and Inventory Clerks perform some or all of the following tasks | <ul style="list-style-type: none"> • Prepare and/or review purchase requisitions/orders as required • Source price quotations and prepare purchase requisitions/orders • Process purchase requisitions/orders within purchasing authority • Monitor inventory levels and reconcile physical inventories with records • Generate and/or review inventory reports • Match purchase requisitions/orders with invoices and forward to accounts for payment processing • Expedite and follow up with suppliers to schedule deliveries, resolve material, value discrepancy, outstanding and overdue delivery of orders, warranty claims and damage, and return of materials |

*Note the OS addresses alternative position titles including Inventory Analyst, Inventory Control Clerk, Supply and Inventory Clerk, Inventory Planner, Procurement Clerk, Purchasing Clerk, Invoice Control Clerk, Supply Technician, Expediter, Supply Chain Analyst, Supply Chain Administrator, etc.

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| | <ul style="list-style-type: none"> • Prepare and maintain purchasing files, reports and price lists • Maintain stock rotation using various approaches such as 'last in first out' (LIFO) and 'first in first out' (FIFO), and dispose of, and account for obsolete stock • Enter data for production scheduling, stock replenishment/relocation and inventory adjustments • Work with internal and external stakeholders to determine supply needs, quality, and delivery requirements • Develop and maintain constructive and cooperative working relationships with others |
| Tools and Technology: | |
| | <ul style="list-style-type: none"> • Computer Hardware and Associated Software and Systems (i.e. analytical or scientific, enterprise resource planning, human resources, inventory management, materials requirements planning logistics and supply chain, forecasting, time accounting, electronic mail, word processing, spreadsheet, database management) • Communication Devices |
| Required Competencies: | (Knowledge, Skills, Personal Attributes) |
| Knowledge | A Purchasing and Inventory Clerk should have knowledge of supply chain, production and processing, customer and personal service, relevant tools and technology, applicable regulations and standards, administration and management, English language, other languages as required, and mathematics. |
| Skills | A Purchasing and Inventory Clerk should have the following skill sets: active listening and learning, reading comprehension, coordination, speaking, judgment and decision making, time management, writing, service orientation, and mathematics. |
| Personal Attributes | (Abilities, Work Values, Work Styles) |
| Abilities | The following abilities are important to the role of Purchasing and Inventory Clerk: written expression and comprehension, oral expression and comprehension, problem sensitivity, speech clarity and recognition, and inductive and deductive reasoning. |
| Work Values | Individuals who will succeed in this position: <ul style="list-style-type: none"> • work independently and are comfortable making decisions, and • adhere to a code of ethical conduct. |

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| Work Styles | The following work styles are attributable to a Purchasing and Inventory Clerk: attention to detail, dependability, cooperation, stress tolerance, independence, initiative, persistence, adaptability/flexibility, integrity, and self control. |
| Essential Skills Profile: | Essential Skills are the skills needed for work, learning and life. They provide the foundation for learning all other skills and enable people to evolve with their jobs and adapt to workplace change. For more detailed essential skills profiles please refer to the ESDC website: http://www.esdc.gc.ca/eng/jobs/les/index.shtml |
| Reading Text | <ul style="list-style-type: none"> • Frequently read purchase requisitions/orders, memos and letters on policy changes, administrative details, and production concerns, material safety data sheets, brochures, material test reports, trade magazines, computer manuals, technical manuals, procedures, applicable standards and regulations, invoices, packing slips, bills of lading, computerized inventories, schedules, signs and labels, supervisor instructions, etcetera |
| Document Use | <ul style="list-style-type: none"> • Utilize, complete and/or read manufacturer and supplier listings, merchandise sale signs, warehouse safety signs, price tables, stock lists and tables, production and delivery schedules, purchase requisition/order forms, estimates, back order lists, product labels, shelving labels, inventory sheets, invoices, shipping forms, packing slips, bills of lading, work schedules, etcetera • Enter information on tables, schedules or other table-like text • May create graphs and charts integrating purchasing and inventory information |
| Writing Skills | <ul style="list-style-type: none"> • Write communications to co-workers, supervisors, suppliers, and both internal and external customers • Write brief entries on purchase requisitions/orders • Write quotes and purchasing option submissions |
| Numeracy | <ul style="list-style-type: none"> • Apply financial math/money math • Apply scheduling, budgeting and accounting math • Apply measurement and calculation math • Apply data analysis math • Utilize numerical estimation |
| Oral Communication | <ul style="list-style-type: none"> • Interact with management, supervisors, staff, customers, and/or suppliers to obtain information, get direction, and to problem solve • Interact with other staff regarding orders and scheduling • May instruct other employees to complete tasks • Participate in staff meetings |

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| Thinking Skills | (Problem Solving, Decision Making, Job Task Planning and Organizing, Significant Use of Memory, Finding Information) |
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| Problem Solving | <ul style="list-style-type: none"> • May receive materials, equipment, supplies, and/or products that were not ordered • May be informed that the arrival of ordered materials, equipment, supplies, and/or products will be delayed • May find that invoices processed do not match inventory sent out • May receive an urgent request for a purchase outside of purchase authority at a time when the correct authority is absent and unable to give approval |
| Decision Making | <ul style="list-style-type: none"> • Make decisions consistent with the organizations guiding policies and/or criteria regarding purchasing, inventory, sales, transportation, logistics, etcetera |
| Job Task Planning and Organizing | <p>Purchasing and Inventory Clerks complete purchase requisitions/orders, complete other administrative paperwork, and check inventory. In conjunction with their supervisors, they set the order and priority of job tasks according to deadlines. Their job tasks are coordinated with the tasks of co-workers. Interruptions are frequent, causing schedules to be readjusted.</p> |
| Significant Use of Memory | <ul style="list-style-type: none"> • Remember policies and procedures relevant to purchasing activities • Remember passwords, categories of items, specific customer names, and specialized and/or frequently used supplier names |
| Finding Information | <ul style="list-style-type: none"> • Refer to lists to find out what items are available, on sale, discontinued, and temporarily unavailable • Search applicable databases to find quantities in stock, parts numbers, pigment numbers and specifications for materials, equipment, supplies, and products • Obtain information about materials, equipment, supplies, and products by communicating with stakeholders • Acquire information about suppliers electronically and/or in other sources such as catalogues, supplier indexes and phone books |
| Working with Others | <p>Purchasing and Inventory Clerks work independently; however Purchasing and Inventory Clerks may also work as members of a team with all stakeholders coordinating tasks in their area of responsibility.</p> |
| Continuous Learning | <p>Purchasing and Inventory Clerks have an ongoing need to learn. They update their knowledge of computer software and systems regularly and receive routine training on company policies and procedures. They may attend purchasing and inventory seminars and industry training programs.</p> |

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| Additional Information | (Physical Aspects, Attitudes) |
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| Physical Aspects | Purchasing and Inventory Clerks use a variety of body positions on the job including standing or sitting for long periods of time. In addition, Purchasing and Inventory Clerks may crouch, kneel down, bend or stoop when completing daily tasks and may be required to move around warehouses. |
| Attitudes | Purchasing and Inventory Clerks must adhere to a code of ethical conduct, have good communication skills, be positive, organized, detail oriented, personable, willing to work with others and accurate when transferring information. Purchasing and Inventory Clerks should also exhibit an awareness of and sensitivity to other cultures. |
| Future Trends Affecting Essential Skills: | Computerized purchasing and inventory management systems, internal communication systems, online ordering, and increased automation will make work more efficient. These trends will lead to the need for Purchasing and Inventory Clerks to routinely upgrade their computer skills so that they can co-ordinate online services. An understanding of the principles of sustainable procurement as they relate to environmental, social, and corporate governance issues is of increasing importance. |

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| Government of Canada Defined - Related NOC Code & Description | <p>1524 Purchasing and Inventory Control Workers</p> <p>Purchasing and Inventory Clerks process purchasing transactions and maintain inventories of materials, equipment and stock. They are employed by retail and wholesale establishments, manufacturing companies, government agencies and other establishments.</p> |
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| Document Management: | | | | |
|----------------------|--------------------|----------------|------------------|------------------------|
| Activity # | Activity Type* | Replaces | New Version Name | Responsible Individual |
| 1 | Document Created | Not Applicable | January 16, 2009 | C. Sellar (CSA) |
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| 5 | Document Finalized | June 29, 2009 | July 29, 2009 | C. Sellar (CSA) |
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***Activity Types:**

- ✓ Document Created
- ✓ Document Modified (Minor Corrections & Editorial Changes)
- ✓ Document Updated (Complete Review)
- ✓ Document Finalized
- ✓ Document Retired

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