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Useful information

Name	Number	Further information
Branch Support Centre	GRO	Transaction advice, stock queries & stock rem discrepancies, Smart ID, balancing and discrepancy support
IT Helpdesk		Horizon technical help, PIN Pad faults, printer issues, Paystation, AEI
Grapevine		Alarm Issues, faults, verify engineer, report suspicious activity, faults with scales and safes (Safetell and Insafe)
Cash Management Cash Centre		Open from 08:30 to 17:00
Discrepancy - cash remittance		If you have not received what is stated on your delivery note
Discrepancy - currency remittance		
24/7 dedicated helpline		For postmasters to use after a traumatic incident at work – leaflet MISC1701 can also be ordered via Horizon
The APS Group (Passport forms supplier)		Order via Horizon. Use this number to report delayed, missing or damaged items
His Majesty's Passport Office		09:00 - 17:00 Monday to Friday 09:00 - 13:00 Saturday
ATM Helpdesk (Diebold Nixdorf)		Faults and queries about ATM
Post Office customer helpline		For customer queries or complaints that you can't help them with
DWP National Benefit Fraud Hotline		If you suspect benefit fraud, call this number
DVLA customer enquiries		For customers' queries about DVLA services that you can't help them with
HR Service Centre		Queries about pay, recruitment
MoneyGram		For Post Office use only; not to be given out to customers
Data Protection	Email	GRO Queries about data protection
Information rights	Customers can email	GRO

Please note: This telephone list is not exhaustive. Go to Horizon Help for a full, up-to-date list.

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This guide provides you with operational instructions for the day to day activities involved in running your branch.

Strategic Partners: If your Post Office branch is located in a Strategic Partner store, such as WHSmith, Tesco, Co-Op, Blakemore etc, in addition to the Post Office processes and procedures, you should also follow all the processes and procedures issued by your company.

> Throughout this guide, we use the term Branch Manager to mean Postmaster or Banking Hub Operator.

Self-registration for training

Self registration is available for all Branch Managers, Postmasters and assistants. Scan the barcode opposite to access the 'Registering for Online Training - Branch Guide'. Here you will find links and instructions for:

- Registering for a classroom course
- Accessing Online Training Resources
- Registering for the Post Office Online Learning Site

Horizon Help

For information about all our products and services at the touch of a button, you can use Horizon Help.

You can select 'Help' from any Horizon screen. If you select 'Help' whilst you're in a transaction it will take you to the product relevant pages (e.g. if you are processing a postal transaction, press 'Help' and you will see the help pages for postal services).

If you select 'Help' from the Horizon Home screen, you can select 'F7' for the help pages, or choose a number of options from the home page, including:

- Branch Focus
- IT Self Help
- Stock codes
- Telephone list
- Compliance workbooks
- Weekly activity

Memoview

Urgent operational messages will appear as 'memoviews' and will pop up on Horizon. They will also appear in Branch Hub:

- To view previous memoviews on Horizon, from the Back Office Home screen select 'View Memo List'
- Memoview is also available on Branch Hub. Log in and select the 'Memoview' tile
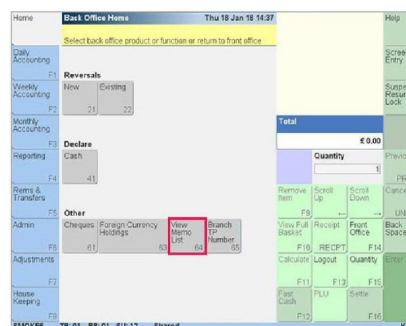
Qualtrics CX (Customer Experience) **XM**

Qualtrics is a customer feedback tool that you can access to help you manage and improve your customer experience. Your Area Manager can request an account for you. Once registered, you can access your reports via the mobile app or on your laptop or computer.

- The Qualtrics XM mobile app is available on Apple Store or Google Play
- The Qualtrics portal can be accessed on your laptop or computer at

GRO

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Branch Hub

You can access Branch Hub from your computer, tablet or smart phone.

Note: For branches, including Strategic Partners, who do not or cannot access Branch Hub whilst in branch, please continue to use Horizon.

To access Branch Hub from a web browser, please visit

GRO

You can use this site to help you run your branch day to day, such as ordering cash and stock, checking planned orders and amending your branch opening hours.

Training and support on Branch Hub

Select the 'Training' tile on the Branch Hub homepage to access training materials, including:

- Operational Training Guide
- How-To videos
- Distance learning packs
- Work aids
- Travel Toolkit
- Mails toolkit

Visit the Branch Operational Training catalogue via the 'Training' tile for a full list of Post Office training resources and where they are available.

Branch Performance feature on Branch Hub

The Branch Performance feature on Branch Hub gives you access to a range of information and data, so you can:

- Track your weekly product and service sales data

- View your weekly remuneration

To find the feature, sign in to Branch Hub and select the 'Your Performance Updates' tile. The feature is exclusively available for Branch Managers, but you can give individual staff members access if you wish.

Digital presence on Branch Hub

The Digital Presence Toolkit is available on Branch Hub, to help you create or expand, your online presence. To find the toolkit, sign in to Branch Hub, select the 'Help and Support' tile and then 'Digital Presence'. The toolkit covers:

- Social media
- Google Business Profile
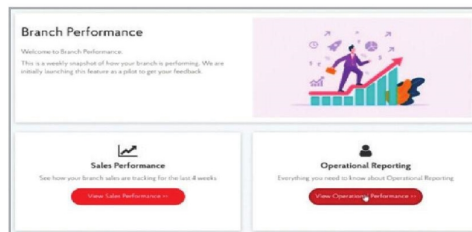- Local Marketing
- Qualtrics

The toolkit provides access to a range of guides, tutorials and case studies which will help you make customers aware of the services you offer in your branch.

Remember: Anyone with a Smart ID can sign up to Branch Hub. The Branch Hub app is available on the App store and Google Play

Training

Access all your branch training and learning here

Branch Performance

Welcome to Branch Performance.

This is a weekly snapshot of how your branch is performing. We are initially launching this feature as a pilot to get your feedback

Sales Performance

See how your branch sales are tracking for the last 4 weeks

View Sales Performance >>

Operational Reporting

Everything you need to know about Operational Reporting

View Operational Performance >>

Branch Hub is regularly updating the site with new ways to help you run your branch efficiently and conveniently. You can leave feedback and suggestions for Branch Hub via a tile on the homepage.

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Marketing support tools

Campaign materials and leaflets are regularly updated, in advance of new promotional activity and product updates.

You can check on current and upcoming campaign materials on Branch Hub via the 'Your marketing tools' tile. Marketing support tools available include:

- View branch display instructions
- Choose your materials for upcoming campaigns
- Marketing POS allocation tool
- Order personalised bespoke marketing materials
- Download animated campaign posters for digital screens

Stock ordering

Stock ordering, where possible should be done using Branch Hub. For branches that are not able to, value and non-value stock can be ordered on Horizon:

- From the Horizon 'Home Screen' select 'Licences and Government'
- Select 'Compliance', then 'Stock Ordering'
- Select 'Create Stock Order'
- Then, either select 'Secure Stock' for value stock items, or 'Transaction Stock' for stationery items, such as till rolls, postage labels and ink

Note: For orders placed on Horizon, stock order codes can be found on Horizon Help, select F5 Stock Ordering Codes

Top tip: Scan this code to be taken directly to the stock ordering screen on Horizon

9 8 2 6 9 3 5 1 0 0 4 0 3

Customer Referrals

When a customer has a genuine interest in a financial services product, all branches can complete a customer referral on Horizon.

- From the Horizon 'Home Screen' select 'Customer Referrals'
- Select the product the customer has a genuine interest in and follow the on-screen prompts – Horizon will let you know if a field is required or optional
- All customers who provide a mobile number will instantly receive a text message verification
- All customers who provide an email address will receive an email with a link to the relevant Post Office product website
- Remind the customer to enter your 'branch response code', also known as a 'Branch Code' or 'FAD Code' when they apply online

Information and guidance for introducing financial services to customers can be found in Section 18 Financial Services Products.