

CTO2012 July 2023

SECTION 2 Getting Started on Horizon V4.0

Getting started on Horizon

Login

You will be given a Horizon username and a temporary password. The username is unique to you and is created from your Smart ID.

- Type in your user name and temporary password and press 'Enter'
- A message will pop up requesting you to create a new password between 7 and 14 characters in length, containing at least one number and one letter
- A message will confirm that you have successfully logged in; press 'Enter' to exit screen

Remember! Never share your password with anyone, including your manager.

Attaching to a stock unit

In order to serve customers, you need to be attached to a stock unit.

- From the 'Home Screen' press 'Back Office' then 'Admin', select 'Attach User'
- Use the down arrow until you find your username – Select your username and press 'Enter'
- Select your stock unit and press 'Enter'
- You are now attached to your stock unit

You won't need to do this every time you log in, but always remember to check you're attached to the correct stock unit by looking at the bottom of the Horizon screen.

Remember! Always complete a cash declaration when you take over a stock unit. You can find out how to do this in Section 10.

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Using two or more Horizon terminals

In branches with more than one Horizon terminal, it is possible to be logged into multiple Horizon terminals at the same time.

This is useful, for example, if you are processing Drop & Go items and need to 'lock' the session, so you can serve a customer at another Horizon terminal.

On the first Horizon terminal:

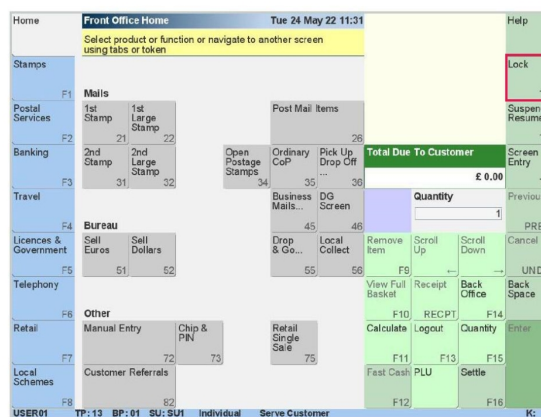
- To 'Lock' the session on your initial Horizon terminal, press 'Lock'

On the second Horizon terminal:

- Now log into a second Horizon terminal to serve a customer
- When you have served your customer and are ready to return to the first Horizon terminal, log out

On the first Horizon terminal:

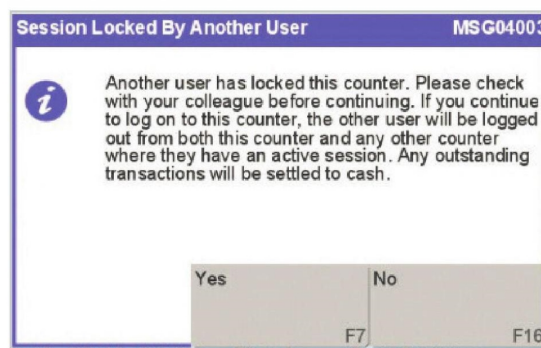
- To unlock and return to the Drop & Go session, press any key to wake up the screen
- Enter your Smart ID password when prompted
- You will be presented with the original session



Please note: You can 'lock' sessions on multiple Horizon terminals, but please remember to complete all sessions and log out of each Horizon terminal.

Warning:

- If another user tries to log in to a terminal that you have locked, they will see a message (see image). If they continue and log in, all of your locked sessions on all terminals will be settled to cash
- If no activity is carried out for 60 minutes, the terminal will time-out. Please remember to return to all locked terminals within 60 minutes. We recommend that you log off from all terminals you are not currently using to avoid this issue



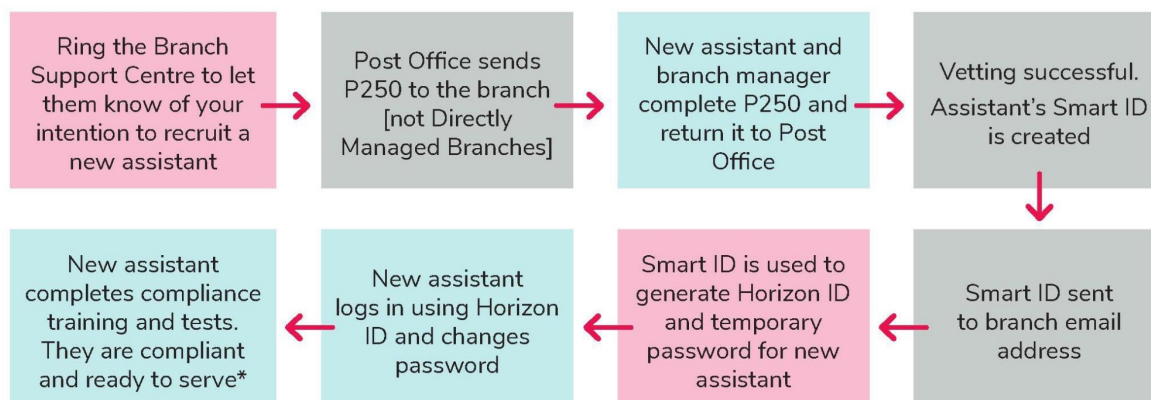
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Smart ID

The Smart ID system links each Horizon user's ID to their training and HR record. If you are recruiting a new assistant, they need to have passed the necessary vetting checks and the compliance training before they can serve customers. Here is an overview of the process to follow:

**Key:**

Branch Manager

Post Office

Branch Assistant

*Directly Managed Branch assistants complete compliance training and test before attending the classroom training.

How does the Branch Manager create a Horizon ID using a Smart ID?

- On Horizon go to 'Back Office', then 'Admin' and select 'Create (User)'
- Follow the on-screen prompts and enter the user's Smart ID, check the name displayed belongs to the user
- The Horizon ID (Smart ID + 2 digits) will be generated
- Create a password for the user, add a role to their Horizon ID, and attach them to a stock unit (if required)
- Tell the user their Horizon ID and temporary password. They can now log in using their Horizon ID and temporary password which they will be asked to change when they log in

For full details go to Horizon Help: 'Back Office', 'Smart ID' 'Create User' 'Counter Process'.

What happens if temporary cover is needed in branch?

- If the temporary assistant has a Smart ID, follow the process to create a new user. If they don't, follow the process for recruiting a new assistant. It's important to make sure the temporary cover has been vetted and passed their compliance training and tests so that they are compliant to serve in branch

How long does it take to get a new assistant live on Horizon and ready to serve?

Once the completed P250 has been sent to Post Office, it can take up to three weeks for vetting to be completed. After vetting is complete, the assistant's Smart ID will be sent to the branch email address.

Top Tip! When planning extra resource for Christmas, allow plenty of time for vetting.

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Transaction Acknowledgements (TAs)

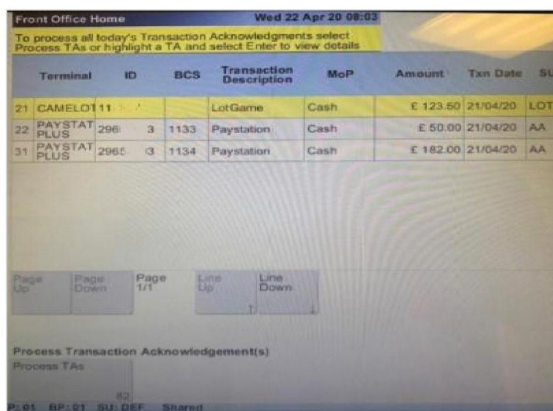
What is a Transaction Acknowledgement?

Transaction Acknowledgements (TAs) are an automated way to account for transactions carried out on the Paystation or Camelot Lottery terminals each day.

Transaction Acknowledgements are sent electronically overnight and are processed by the first person who logs into Horizon after it has been sent.

A pop-up message appears on Horizon and you won't be able to serve until the outstanding Transaction Acknowledgements have been processed:

- Check the cash received for your Paystation and Lottery transactions against the list of outstanding Transaction Acknowledgements
- 'Process TAs' to accept all entries on the screen
- Physically move the cash in or out of the stock unit where the Transaction Acknowledgements were accepted. This ensures that your stock unit will balance



Viewing accepted Transaction Acknowledgements

There may be occasions where an assistant needs to serve customers quickly, so they process the Transaction Acknowledgements without checking or physically moving the cash in or out of the relevant stock unit.

On those occasions, you can print a report to show what was accepted, on Horizon go to:

- 'Back Office', 'Reporting', 'Reporting Office', 'Outstanding and Processed'
- Enter dates from (yesterday) to (today)

This report prints on the back office printer, so remember to switch it on.

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The Basics of Customer Experience

Our Customer Experience Drivers help us understand what our customers want from us. These underpin our values and help us focus on the things we know that are important to our customers. Our behaviours in these Drivers define how customers rate our customer experience.

“I want the person who serves me to be friendly, act and present themselves professionally, while effectively using their expert knowledge to get me the right product. It’s important they actively listen and understand my needs to serve me in an efficient manner.”

Here you will find the key basics a customer would expect from us, each and every time they visit. Remember, these are the basics. We should always be actively looking for ways to delight our customers.



FRIENDLY	PROFESSIONAL	KNOWLEDGE	UNDERSTANDING	EFFICIENCY
<ul style="list-style-type: none"> Greet customers with a smile Thank customers for waiting where appropriate Give my full attention throughout their visit I use good manners at all times I build rapport with customers Listen and talk in a pleasant, good natured, easy manner Treat my customers with warmth and respect, caring about the experience I provide Always say goodbye and thank you as customers leave 	<ul style="list-style-type: none"> I look smart at work, taking pride in my appearance Respond appropriately and build rapport with customers, providing relevant information with respect and integrity I am able to understand the different needs and priorities of customers I engage appropriately with different customer types whilst remaining calm under pressure 	<ul style="list-style-type: none"> I have a good understanding of the transactions, products and services we offer and keep myself up to date with changes I am aware of my surroundings and how to use the technology relevant to my role I perform a wide variety of tasks and learn new skills quickly I share my knowledge with colleagues and am comfortable observing others to learn new things 	<ul style="list-style-type: none"> I offer a personalised customer experience by asking relevant questions to help me identify what is important to my customers I know how to fulfil my duties and understand the attributes that lead to great customer satisfaction such as being easy to do business with We have a variety of product experts and refer customers to those where appropriate 	<ul style="list-style-type: none"> I am prepared and organised, ready to do my job in the best possible manner with the least waste of time and effort I make sure I have everything I need to do my job before starting each shift I am capable and confident and can work at pace to meet customer flows and demands with a flexible attitude I focus on important tasks first, limiting distractions, so my customers can see I value their time

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