



Horizon Service Improvements Workshop



Location: Fujitsu Bracknell

Date: 05/09/2013

Attendees: NFSP - Jim Nott – Post Master

POL - Steve Beddoe, Scott Somerside, Andy Winn, Anne Allaker,

Fujitsu - Steve Bansal, Jon Hulme, Natalie Jones, Joe Jeffery, Mukesh Mehta

1. Original Service Improvements List

The following service improvements were on the initial agenda, and were demonstrated by Jim on a test counter.

1.1 Branch Ordering of Stock

Issue Summary

For each different stock item to be ordered, the clerk must navigate many screens, returning to the Horizon menu after each item. This is very time consuming when ordering multiple items, this is AP-ADC script driven.

Issue Detail

The current stock ordering transaction is executed on a counter by the clerk navigating to Licenses & Government, Compliance, Stock Ordering. Then a series of transaction screens must be navigated to order an item. The postmaster said that to order 10 different items, approximately 140 screens had to be navigated, and that every fortnight his two counter post office typically orders 30 or 40 items. Each stamp denomination is a separate item.

Clarifications needed

One of the first questions the stock ordering transaction asks the clerk is to input the “order line”. The postmaster did not know what this was for, and always enters “1”.

The rules around how POL advises and polices the minimum and maximum quantity of an item that can be ordered by a branch was not known to the postmaster or those present.

Suggested Improvements

The following improvements were raised for consideration:

- a) To allow the transaction to loop after confirming an item has been added to the order, without exiting the transaction.
- b) To allow multiple items to be selected in the pick lists, rather than only a single item.
- c) To display on the pick list row a description as well as an item id. Currently the postmaster has to look up the item id in a manual, and watch out for notification of new ids from POL.
- d) To display on the pick list row the minimum and maximum quantities that can be ordered.
- e) To allow a quantity to be entered on each row in the pick list, rather than prompting for a quantity on a subsequent screen.
- f) To display in the pick lists items in Most Recently Used order for that branch.
- g) To print a list of items ordered by the transaction so that the postmaster can see what has been ordered so far (currently the postmaster cannot see what items have been ordered).



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1.2. Certificates of Posting

Summary

If a clerk requests a Certificate of Posting (COP) for a non-tracked mail item (e.g. 1st Class Parcel), Postal Services does not request a destination address and so the receipt printed does not include the destination building/postcode (and is therefore not really a COP).

Customers often required a COP for these services (e.g. eBay customers posting multiple mail items), and so either the clerk has to run a separate time-consuming COP transaction one at a time for each item, or has to hand-write the address on the Postal Services receipt (which may not be acceptable to the customer or to Royal Mail).

Issue Detail

The following is an example receipt produced when the clerk presses “Post Mail Items”, selects a 1st class parcel, and selects “Yes” for a Certificate of Posting. No address is prompted for, and none is printed.

Post Office Ltd. Your Receipt	
Village Stores School Road Coddanham Ipswich Suffolk IP6 9PY	
Date and Time:	05/09/2013 14:10
Session ID:	1-3037
Dest:	UK (EU)
Quantity:	1
Weight:	0.100 kg
1st Class Parcel	£1.58
Total Cost of Services	£1.58
IT IS IMPORTANT THAT YOU RETAIN THIS RECEIPT AS IT IS YOUR PROOF OF POSTING	
PLEASE REFER TO SEPARATE TERMS AND CONDITIONS	
For information regarding Royal Mail products and services contact us on 08457 740 740 or visit our web site at www.postoffice.co.uk	
This is not a VAT Receipt Thank You	



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The separate Certificate of Posting transaction is a run by the clerk navigating to Postal Services, Ordinary CoP which prompts for a post code and house number and adds a deferred receipt to the session.

Post Office Ltd.
www.postoffice.co.uk

05/09/2013 15:36 TP:50 BP:01 SU:SH1
Coddenham FAD: 6913051
Village Stores
School Road
Coddenham
Ipswich
Suffolk
IP6 9PY

Session Id: 1-3037
Txn Id: 17

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An item addressed as follows:-

Building Name or No: 1
PostCode/Zip Code: RG128WU

Has been accepted here today.

It is important that you retain this receipt as it is your Proof Of Posting.

Please refer to Separate Terms and Conditions.

Standard Compensation. For lost or damaged items, compensation up to 100 times the price of a basic weight 1st Class stamp will only be paid with this receipt. To claim call 08457 740 740 or pick up a form at a Post Office branch.

For information regarding Royal Mail products and services visit our web site at www.postoffice.co.uk

Withdraw cash over the counter from your bank account at any of our branches(selected banks) It's free and easy

www.postoffice.co.uk/banking

This is not a VAT receipt

Clarifications needed

I'm not clear if the deferred receipt is also an issue, because it does not print immediately and so multiple receipts are printed at settlement which then have to be reconciled by the customer against the whole batch of mail items being posted.

A secondary request was made with PayPal in mind. Want ability to have one receipt for all COP. Royal Mail may not like this. Need to ask.

Suggested Improvements

The Post Mail Items transaction could be improved to optionally prompt for an address when a COP is requested for a non-tracked mail item.

1.3. Postcode Lookup

Summary

Within a Postal Services transaction, the clerk may perform a lookup on an address to obtain the postcode. This may result in multiple addresses to choose from, and if these are long addresses then the actual postcode (being shown at the end of the address line) is lost because the text is truncated. This hinders the clerk from identifying the correct address result to select.



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Issue Detail

In the following example, the postcodes on rows 21, 22, 41 and 52 are lost.

Suggested Improvements

The following improvements were raised for consideration:

- Provide 4 results instead of 8 results per page, giving space for two rows of text for each result. This provides space to display the full address, but means the clerk may have to step through more pages of results to find the one required.

- Place the postcode first in the result, followed by the remainder of the address.

Note: Other transactions (e.g. AP-ADC) also uses this postcode lookup screen, so consideration needs to be given to whether these should also change or not. Also, putting the postcode first may not be helpful if the postcode was supplied in the first place in order to lookup a full address.

1.4. Passport Duplicates

Clarifications needed

Those present were not clear what the issue was, and so the source material needs to be examined to understand the issue.

1.5. Rem Out for End of Day Cheque Processing

Summary

Customer cheques accepted during trading are processed at end of day. The clerk performs the following process:

- Produce the Counter Daily Cheques Listing report.
- Reconcile that this list matches the physical cheques and total value.
- Rem the cheques out to EDS (manually keying in the total amount).
- Produce the Counter Daily Cheques Listing report again and cut it off.



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This is a lengthy process, and unnecessarily runs the report twice. It also increases the potential for the clerk to enter an amount which does not match the report total amount.

Issue Detail

The clerk navigates to Back Office, Reports, Cheques and previews or prints the report.

Having reconciled the results against the physical cheques they then navigate to Back Office, Rems & Transfers, Out to Cheques, Cheques and enter the total amount to Rem Out and settle (producing a remittance out slip).

They then have to navigate again to Back Office, Reports, Cheques and preview or print the report. Finally they have to Cut Off the report.

Suggested Improvements

An improvement could be to provide an additional button on the Counter Daily Cheques Listing screen to invoke the cheque Rem Out process and return when complete.

The detailed flow and rules to be determined, i.e.

- The Rem Out button might only be enabled once the report is previewed or printed.
- The Cut Off button might only be enabled once the Rem Out is complete.
- Should the amount to Rem Out be defaulted but allowed to be changed?

2. Additional Service Improvements

The following additional service improvements were also mentioned by the postmaster for consideration. These were not demonstrated and so our understanding may be limited.

2.1 Travel Money Debit Card Branch Receipt

Summary

When a clerk sells travel money to a customer, and the customer pays by a debit card, the security check responses performed by the transaction and card details are printed on the session receipt at settlement.



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The clerk can request a duplicate session receipt, but if they do not and proceed with another customer, then the reprint is no longer available to the clerk.

If the bank subsequently challenges the transaction, the postmaster needs to provide proof that the security checks were performed. They cannot do this without a receipt, and may therefore have to make good the transaction and be out of pocket.

This info is captured on the Session Receipt, so it should be visible on Credence. Therefore FSC could get this data from Credence. NB it is only held in Credence for a limited time.

Suggested Improvements

The suggested improvement is to print a duplicate branch receipt when the travel money is paid for by debit card.

In order to be consistent with other receipts this should probably indicate it is a branch copy.

2.2 Transaction Acknowledgement Print Out

Summary

Transaction Acknowledgements (TAs) are typically processed and accepted in the morning when a clerk logs in to the counter. This clerk may not be the same person who is responsible for reconciling TAs that have been accepted, and when that person arrives at the post office the information regarding processed TAs is no longer available. An example like Lottery not coming through was cited.

Suggested Improvements

Details of TAs need to be printed when accepted so that there is a record.

A report is already available, and so this improvement is considered to already be present.

Post Office could revisit communications on this subject.

2.3 Reversed and Cancelled Transaction Print Out

Summary

During trading, transactions may be reversed by clerks, or cancelled (resulting in a zero value transaction).

The postmaster is not currently able to see a report of these transactions and so cannot audit what staff are doing in this area.

Suggested Improvements

Provide a report of cancelled and reversed transactions. Consider limiting to banking as not all transaction cancellations are recorded

2.4 Transaction Corrections Print Out

Summary

The postmaster needs to be able to see which Transaction Corrections have been processed and which are outstanding.



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Suggested Improvements

This report is already available, and so this improvement is considered to already be present. Post Office could revisit communications on this subject.

2.5 Sale of Stamp Books by Barcode Scan

Summary

A book of stamps has a retail barcode on the back, but the clerk cannot scan this and has to manually press the appropriate button of the Horizon counter.

Suggested Improvements

Cause the counter to be able to add a book of stamps in to the basket by scanning the barcode.

2.6 Horizon Help can lose transactions

Summary

If Help is entered while the counter is in the middle of a transaction, in some cases it can lose the transaction.

Suggested Improvements

Fix this. However, we need more information about what transactions or circumstances cause this issue to occur.

2.7 Destroyed Motor Vehicle Licenses (MVL)

Summary

If an MVL is filled out incorrectly it must be “spoilt”. This is achieved by running a separate “spoil” transaction. Unfortunately this reverses out the MVL stock decrement so that it appears the stock level should be as it was originally.

The clerk is meant to use Back Office, Stock Balancing, Adjust Stock (AP-ADC script driven) to adjust the stock level, but if they neglect to do this they will have a discrepancy.

Suggested Improvements

Need to recreate. Look at the spoil transaction and see if it can handle the stock level change correctly.

Possible communication required on the fact that there are two bits to this process. Front end and Back end.

2.8 ETopUp Receipt Print Failure

Summary

If an eTopUp receipt fails to print, the reprinted receipt does not have the eTopUp activation code on it. This means that if the postmaster needs to reverse the eTopUp, and does not do so within the 10 minute reversal window, they are unable to claim back from the provider.

Suggested Improvements

Need to recreate. Print the activation code on the reprinted receipt.



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2.9 POCA Lost Cards

Summary

If the customer loses their POCA card (apparently 10% of customer per year) then the clerk obtains a replacement card. In order for the card to be activated and usable in an ATM, the clerk has to swipe the card, and say "Yes" when prompted "This is a chip and PIN card, are you sure you want to swipe it?" They then have to wait 2 to 3 minutes, while the customer is present, before the customer can enter their PIN to get a balance and complete the activation. This is a very long time for the customer to wait.

Suggested Improvements

Obtain POCA cards from POL and recreate issue. Look at why such a long wait is involved and recommend a solution.