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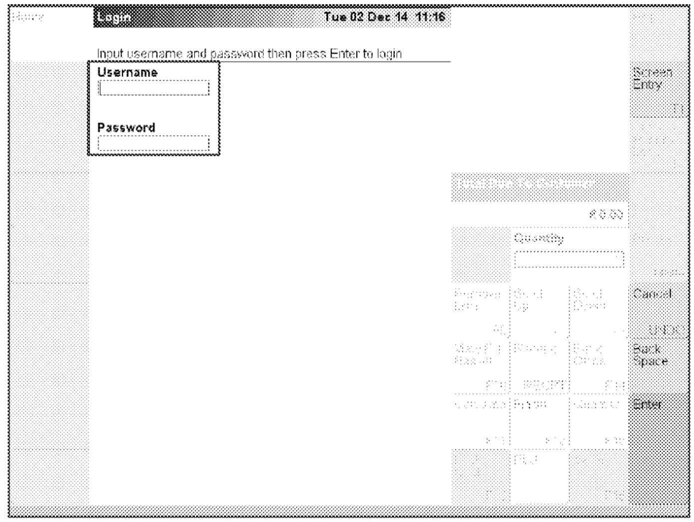
Getting Started

Login

You will be given a Horizon username and a temporary password. The username is unique to you and is linked to your Smart ID. You can find out more about Smart ID on the next page.

- Type in your user name and password and press 'Enter'
- A message will pop up requesting you to create a new password. This must be at least 7 digits long, but no more than 14, and must contain one letter and one number
- A message is then displayed telling you that you have successfully logged in, press 'Enter' to exit screen



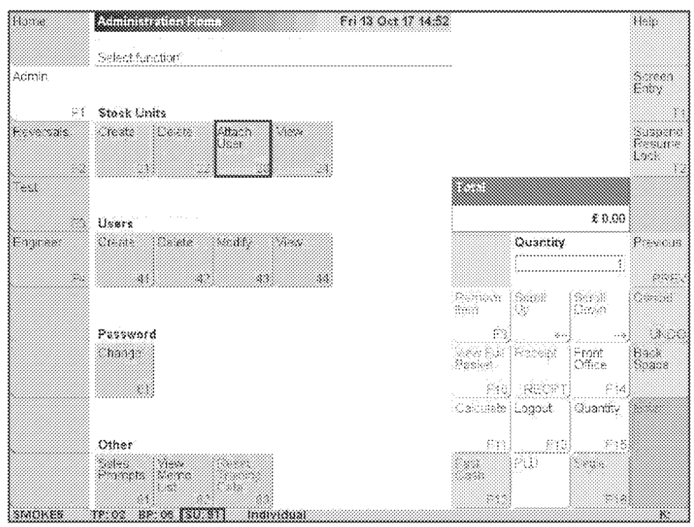
Remember! Never share your password with anyone, including your manager.

Attaching to a stock unit

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

- From the 'Home screen' press 'Back Office' and then 'Admin'
- Select 'Attach User'
- Use the down arrow until you find your username - Select your username and then press 'Enter'
- On the next screen 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 login, 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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Smart ID

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

Inform HR Service Centre (HRSC) of intention to recruit new assistant → HRSC sends P250 to the branch [not Directly Managed Branches (DMB)] → New assistant completes and returns P250 to HRSC (not DMB assistants) → Vetting successful. Assistant's Smart ID is created → Smart ID sent to branch email address → Smart ID is used to generate Horizon ID and temporary password for new assistant → New assistant logs in using Horizon ID and changes password → New assistant completes compliance training and test. They are compliant and ready to serve*

Key:

Postmaster / Branch Manager	**Post Office**	**Branch Assistant**

*DMB assistants complete compliance training and test before attending the classroom training.

How does the postmaster/branch manager create a Horizon ID using Smart ID?

- In Horizon Back Office Admin select Create (User)
- Follow on-screen prompts and enter the user's Smart ID, checking 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

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 assistant has sent their P250 to HRSC, it takes on average 3 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 (TA)?

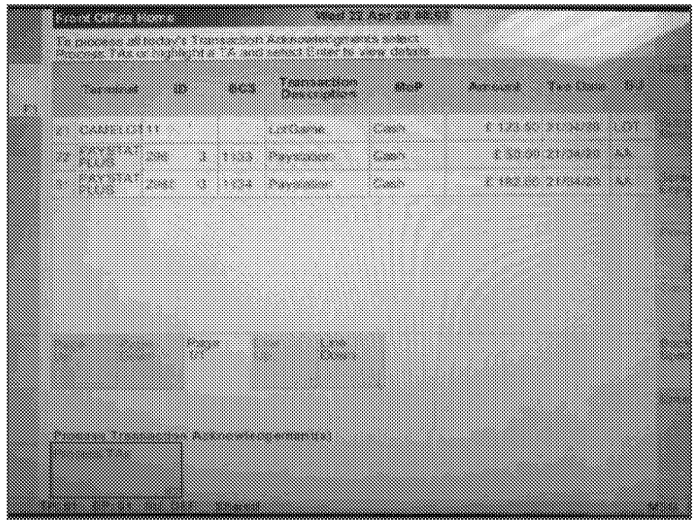
Transaction Acknowledgements (TA) are an automated way to account for transactions carried out on the Paystation or Camelot Lottery terminals each day.

TAs are sent electronically overnight and are processed by the first person who logs into Horizon Online the next working day.

A pop up message appears on Horizon and you won't be able to serve until the outstanding TAs has been processed.

You need to:

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



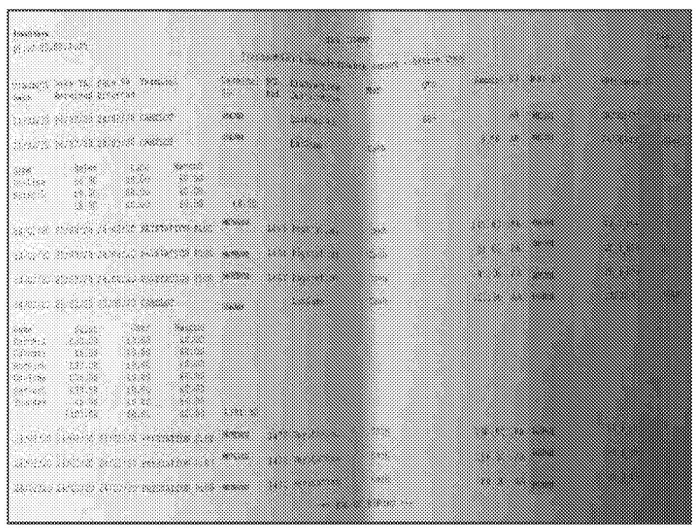
Viewing accepted TAs

There may be occasions where an assistant needs to serve customers quickly, so they process the TAs 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:

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

This report prints on the Back Office printer, so remember to switch it on.



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WHY IS THIS BLANK NAT?

I've also amended the PNG of the CX page as the text was not readable and was blurry

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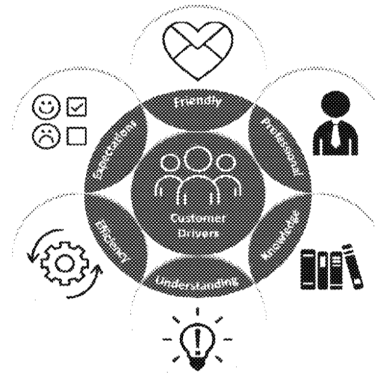
POST OFFICE | CUSTOMER EXPERIENCE XM

The Basics of CX

Our Customer Experience Drivers and Behaviours help us deliver a great experience. 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. Being friendly, acting, and presenting ourselves professionally while displaying good levels of knowledge are very important to customers, as well as understanding their needs and meeting their expectations in an efficient way.

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



Friendly

- 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.

Professional

- 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 engaging appropriately with different customer types whilst remaining calm under pressure.

Knowledge

- 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.

Understanding

- 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 these where appropriate

Efficiency

- 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.

Expectations

- I take the time to build relationships with my customers to help me get to know them and understand their needs.
- I listen and ask the right questions to see if my customers have additional related needs to go beyond their expectations.
- I am honest, authentic and try to look at my branch through the eyes of my customers to look for improvement opportunities.