Business Week begin 8 and 15 March – File Management

Learning Intention:

- By the end of these lessons you will understand mail handling in a business

Success Criteria:

- You must be able to understand both incoming and outgoing mail processes
- You should be able to identify mail handling equipment
- files.
- You could describe the services offered by the mail handling department

Lesson Information

The lesson contains information about business mail handling

Pupil Task:

- Attend the Live Lesson (watch the posting of the Live Lesson on Teams)
- Complete the questions at the end of the booklet
- First week (beginning 8 March) – complete Q1 – 9
- Second week (beginning 15) – complete Q10 - 18

S3 Administration and IT

Mail Handling Notes and Tasks

Outcomes

- Types of Mail
- Procedures for handling Mail
- Mail Room Equipment
- Mail Services

The Mail Room

Most large organisations have a Mail Room to deal with the large volume of mail it receives and generates. Staff will be trained in how to deal with mail in the most efficient manner for the whole of the organisation.

In smaller organisations the role of mail handling will often be part of the Reception staff/Admin staff role

The way in which mail is received and sent has changed greatly over time. In the UK we used to rely on Royal Mail for all our postal services. However, now there are several alternative couriers that organisations can use (this is especially true for parcels).

Most organisations used fax (facsimile) machines from the 1980s onwards, but since the growth of e-mails, as computers became more common, fax machines are not used anywhere near as much as they used to be.

Types of Mail

There are 3 main types of mail –

Incoming mail	mail (letters, parcels, e-mails, voice mails, faxes) that comes into the organisation from external sources eg customers, suppliers, banks, council.
Outgoing mail	mail (letters, parcels, faxes) that are sent from the organisation to external sources eg customers, suppliers, banks, council.
Internal mail	mail sent and received from within the organisation This could be from within the same building or from different branches that are part of the same organisation eg Edinburgh to Glasgow branches.

Mail Room Equipment

Electronic Letter Opener	
- Cuts off a small strip close to the top edge of the envelope. - Can deal with different sizes of envelopes. - Used for opening large amounts of mail. - Envelopes tapped before putting through machine.	

Date Stamp

- Used to stamp date of receipt on incoming mail.
- Current date is set every day
- Date of receipt may be referred to if there is a query about time taken to deal with correspondence
- Date is stamped on a blank area of correspondence.

Scanner

- Scans a document and creates a digital copy.
- Some organisations scan all mail (except P&C) and e-mail digital copy to recipient.
- If correspondence has to be seen by more than once person, it can't be e-mailed to them all at the same time.
- Some printers and photocopiers come with scanning abilities.

Computer

- Used to e-mail digital copies of correspondence to employees.
- Used to receive, forward and respond to e-mails sent to an 'enquiries@' e-mail account.
- Used to research postal costs, courier costs, buy postage.

Sorting Trays

- Used to sort incoming mail into departments/or for individual employees.
- Used to sort outgoing mail into categories eg first class, second class, signed for, air mail.
- Helps to keep the mail room tidier and less likely to lose correspondence.

	Mail Trolley
	• Used to deliver incoming mail to departments/individual members of staff. • Used to collect outgoing mail from departments/individual members of staff at specific times of the day. • Mail is pre-sorted for delivery efficiency.

Shredder

• Cuts (shreds) documents into narrow strips.
• Used to destroy old, confidential or sensitive documents.

	Printer/Address Printer
	• Printer is used to print out outgoing correspondence. • Can be used to print address labels. • Many photocopiers now have a printing facility allowing documents to be printed through the photocopier directly from a computer. • Address printer prints address directly onto envelope.

Photocopier

• Used to produce multiple copies of a document.
• Features include size reduction or enlarging, lighten or darken document, copying in black and white or colour, collating multiple page docuemnts, stapling documents, creating booklets.
• Many photocopiers offer the ability to print directly from computers.
• Many photocopiers offer the ability to scan documents and create a digital copy.
• Many photocopiers offer the ability to fax documents.
• Photocopiers can be set up with individual accounts to keep track of usage.

	Folder Inserter
	• Folds letters, leaflets, brochures and inserts them into envelopes. • The machine can handle different sizes of documents and envelopes. • Saves time inserting envelope contents by hand.

Electronic Postal Scales

- Used to calculate cost of postage according to weight (and size).
- Can be used to calculate postage for different services.

Franking Machine

- Prints postal impression onto envelopes or labels (postal charge, date and place of posting).
- Postal impression can include business name/slogan as part of their marketing tools.
- Can be faster than sticking lots of stamps on correspondence.
- Less expensive to send franked mail than stamps.
- No chance of running out of postage.
- Some franking machines measure and weigh the correspondence to calculate the correct postal charge.
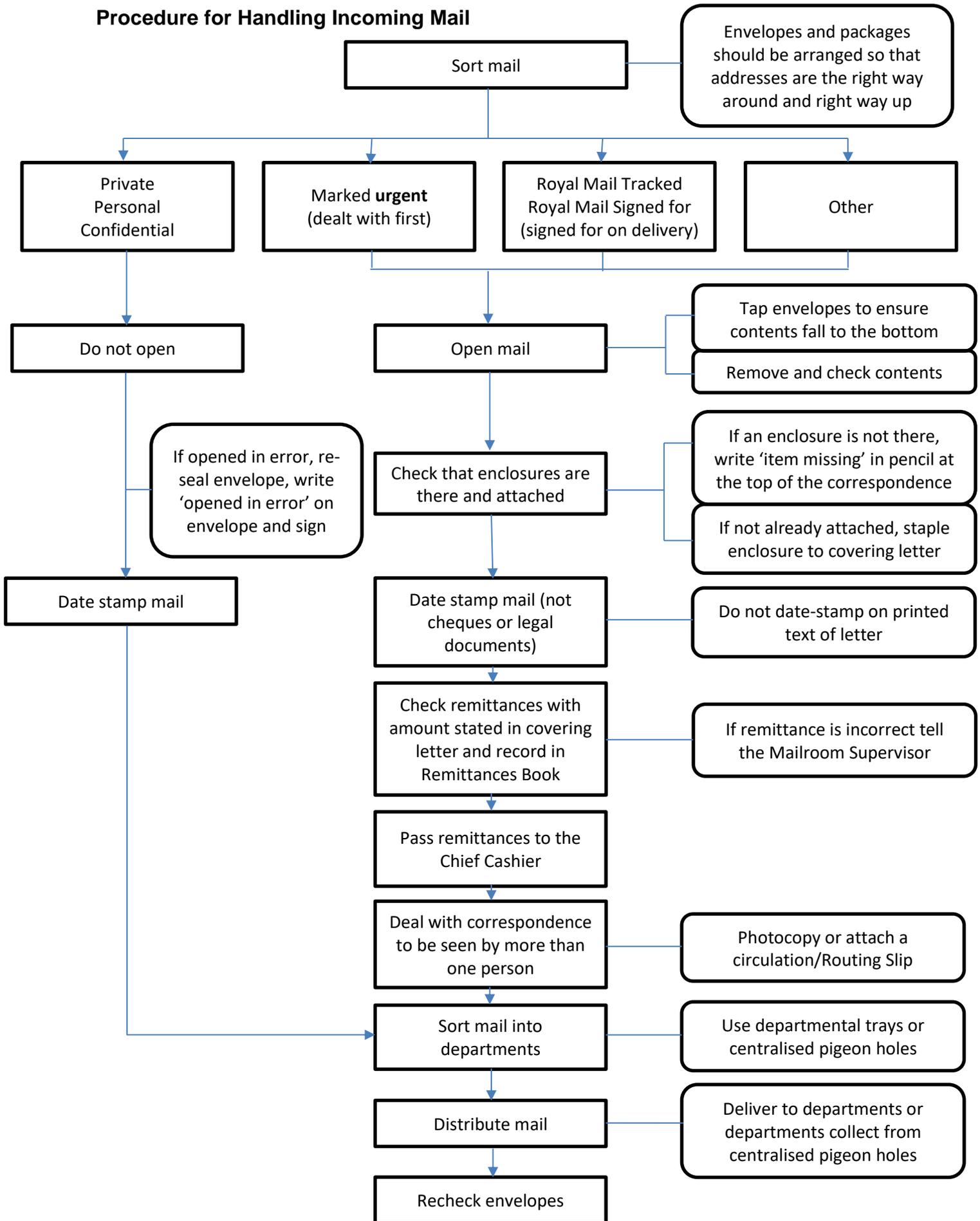
Fax Machine

- Fax machine scans document and an exact (facsimilie) copy can be sent quickly to anywhere in the world.
- Fax machines use telephone lines to transmit the information.
- Fax numbers are dialled (like telephone numbers) to connect to the receiving fax machine.
- Transmission reports can be printed to confirm transmission and show the length of the documents (eg 3 pages) and time of transmission.
- A fax cover sheet is used when sending a faxed document. This provides information about the organisation and individual sending the document.
- Incoming faxes should have the transmission report stapled to the document before being passed to the recipient.
- Faxing documents is much quicker than using a postal service (although many organisations use e-mail instead of faxing now).
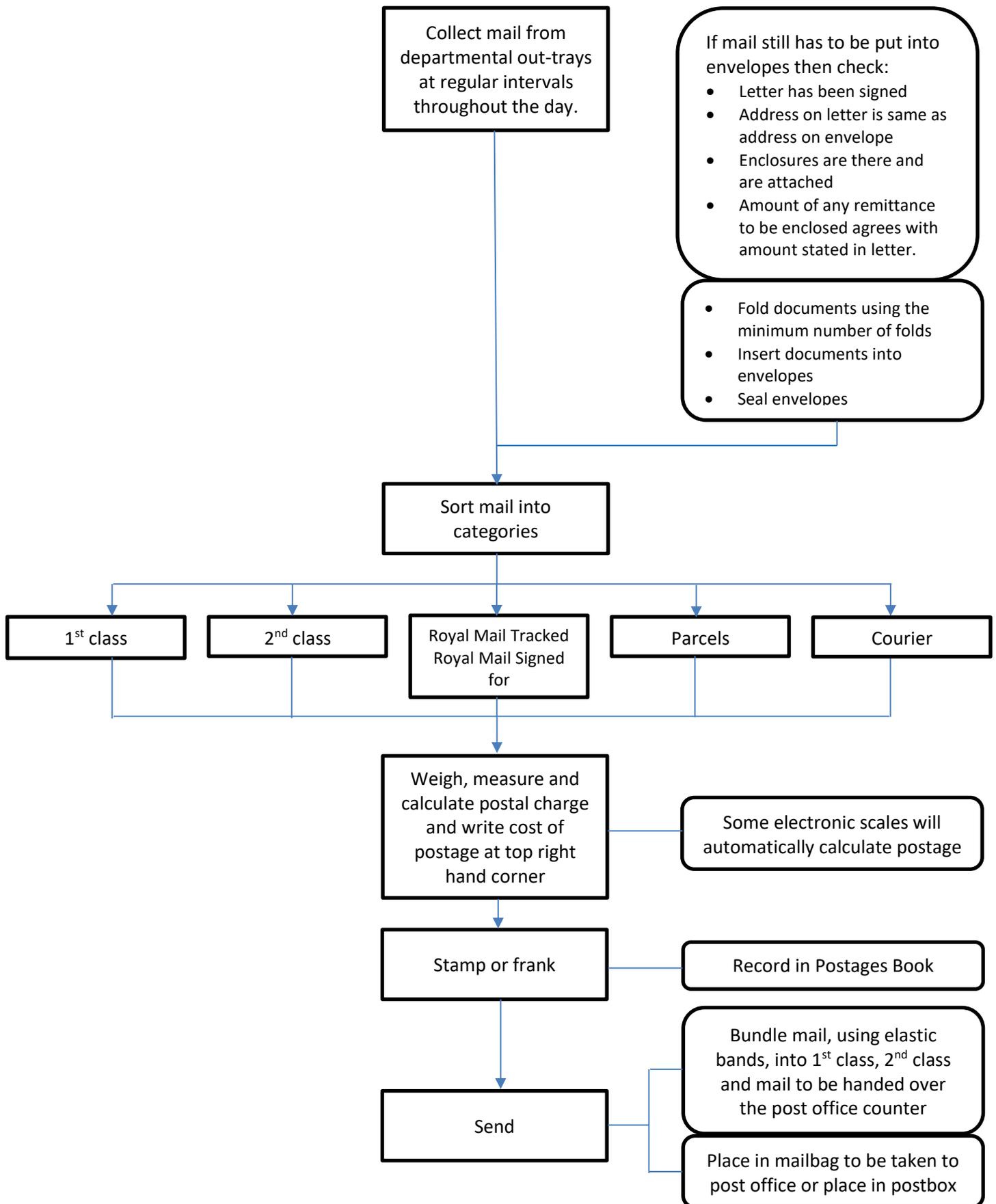- Many photocopiers offer the ability to fax documents.

Phone/Voicemail

- Voicemail allows a message to be left when the call cannot be taken (organisation closed, phone lines busy).
- Voicemails can be left at any time of the day and listened to at a convenient time.
- Avoids errors in passing on messages verbally or written.

Procedure for Handling Incoming Mail

Sort mail → Envelopes and packages should be arranged so that addresses are the right way around and right way up

Sort mail branches into:
- Private Personal Confidential
- Marked **urgent** (dealt with first)
- Royal Mail Tracked Royal Mail Signed for (signed for on delivery)
- Other

Private Personal Confidential

Do not open

If opened in error, re-seal envelope, write 'opened in error' on envelope and sign

Date stamp mail

Marked urgent / Royal Mail / Other

Open mail
- Tap envelopes to ensure contents fall to the bottom
- Remove and check contents

Check that enclosures are there and attached
- If an enclosure is not there, write 'item missing' in pencil at the top of the correspondence
- If not already attached, staple enclosure to covering letter

Date stamp mail (not cheques or legal documents)
- Do not date-stamp on printed text of letter

Check remittances with amount stated in covering letter and record in Remittances Book
- If remittance is incorrect tell the Mailroom Supervisor

Pass remittances to the Chief Cashier

Deal with correspondence to be seen by more than one person
- Photocopy or attach a circulation/Routing Slip

Sort mail into departments
- Use departmental trays or centralised pigeon holes

Distribute mail
- Deliver to departments or departments collect from centralised pigeon holes

Recheck envelopes

Procedure for Handling Ougoing Mail

```
┌─────────────────────┐          ┌─────────────────────────────┐
│  Collect mail from  │          │ If mail still has to be put  │
│ departmental out-    │          │ into envelopes then check:   │
│ trays at regular     │          │  • Letter has been signed    │
│ intervals            │          │  • Address on letter is same │
│ throughout the day. │          │    as address on envelope    │
└─────────────────────┘          │  • Enclosures are there and  │
                                  │    are attached              │
                                  │  • Amount of any remittance  │
                                  │    to be enclosed agrees     │
                                  │    with amount stated in     │
                                  │    letter.                   │
                                  └─────────────────────────────┘

                                  ┌─────────────────────────────┐
                                  │  • Fold documents using the  │
                                  │    minimum number of folds   │
                                  │  • Insert documents into     │
                                  │    envelopes                 │
                                  │  • Seal envelopes            │
                                  └─────────────────────────────┘
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┌─────────────────────┐
│   Sort mail into    │
│     categories      │
└─────────────────────┘
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1st class	2nd class	Royal Mail Tracked Royal Mail Signed for	Parcels	Courier

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┌─────────────────────┐          ┌─────────────────────────────┐
│  Weigh, measure and │          │  Some electronic scales will │
│ calculate postal     │          │  automatically calculate     │
│ charge and write     │          │  postage                     │
│ cost of postage at   │          └─────────────────────────────┘
│ top right hand corner│
└─────────────────────┘

┌─────────────────────┐          ┌─────────────────────────────┐
│   Stamp or frank    │          │    Record in Postages Book   │
└─────────────────────┘          └─────────────────────────────┘

                                  ┌─────────────────────────────┐
                                  │  Bundle mail, using elastic  │
                                  │  bands, into 1st class, 2nd  │
                                  │  class and mail to be handed │
                                  │  over the post office counter│
┌─────────────────────┐          └─────────────────────────────┘
│        Send         │          ┌─────────────────────────────┐
└─────────────────────┘          │  Place in mailbag to be      │
                                  │  taken to post office or     │
                                  │  place in postbox            │
                                  └─────────────────────────────┘
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Documents used in Mail Handling

Remittance book – used to record any payments received. Details include date remittance (payment) is received, who the payment is from (sender), type of remittance, amount and signature of person recording remittance.

REMITTANCE BOOK				
DATE	**SENDER**	**REMITTANCE**	**AMOUNT**	**SIGNATURE**
5/12/20	Smith & Sons	Cheque	£150.00	*J Gordon*
18/12/20	Jasper Ltd	Cheque	£70.00	*S Valentine*
24/12/20	A Hopkins	Postal Order	£95.50	*R Taylor*

Postage book – used to record any money spent on postage costs. Details inclue date purchased, postage purchased eg 1st class stamps, amount and signature of person purchasing postage.

Postage Book			
Date	**Postage**	**Amount**	**Signature**
10/12/20	1st class stamps x 20	£15.20	*T Spencer*
14/12/20	1st class stamps x 10	£7.60	*L Grohl*
15/12/20	RM Signed for	£2.25	*R Taylor*

Circulation slip – used when a piece of correspondence needs to be seen by more than one person. The circulation slip shows all of the people who need to see the correspondence. The first person to revieve the correspondence initals the circulation slip and then passes the correspondence to the next person and so on.

Circulation Slip		
The attached document has to be seen by:		
NAME	DEPARTMENT	INITIALS
Ms N Hope	Accounts	NH
Mrs M Williams	Office	MW
Mr S Davidson	Purchasing	

Internal mail envelopes – used to send correspondene to other employees within the organisation. This may be within the same branch or in another branch. The envelopes are used many times, with the receivers details written in one section of the envelope and then scored out when the envelope is reused.
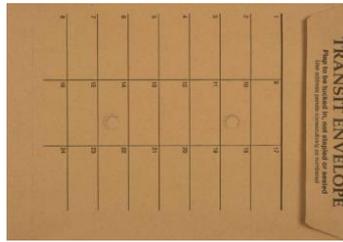
Fax cover sheet – used when sending a fax to show the organisation and person who is sending the fax, recipient's name and department/job title, number of pages being faxed (including cover sheet) and any message.

Folding Correspondence into Envelopes

The rule when folding correspondence for envelopes is to make as few folds as possible to allow the document to use the full space of the envelop. When folding an A4 document into a DL envelop (the most common type of envelope used in organisations) the easiest thing to do would be to fold it in half and then half again, however, this would leave quite a lot of space in a DL envelop. So instead you would fold one third of the document, press down and then fold another third and press so you have 2 folds and 3 sections.

The diagram below shows how documents should be folded according to their size and envelop used.
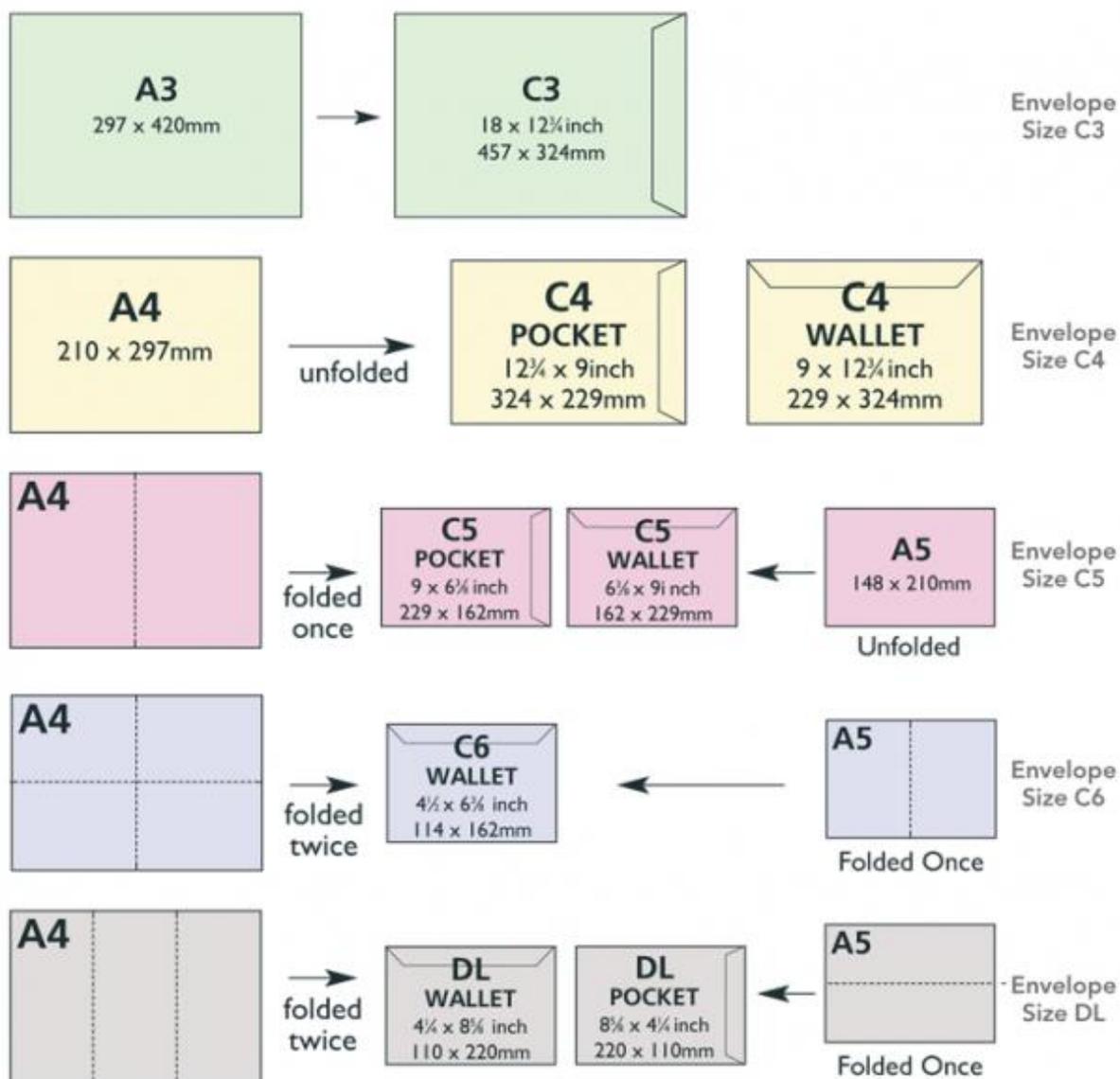
Addressing Envelopes

If you have to handwrite an address on an envelope there are some guidelines to follow –

- Start writing halfway down the envelope and a third of the way across (this will place the whole address in a cental position on the envelope.

- Start each line directly under the last, do not indent each line.

- Line 1 – Name of addressee, including title if known eg Miss L Taylor

- Line 2 – Job title of addressee if known eg Teacher of Business Education

- Line 3 – Organisation name eg Gracemount High School

- Line 4 – Street (first line of address) eg 136 Lasswade Road

- Line 5 – Town/City (in capitals) eg EDINBURGH

- Line 6 – Postcode (should not include any punctuation or be underlined) eg EH16 6TZ

- Some addresses may include an area before town/city eg Morningside or may include a county after town/city eg Lothian

- If the letter is urgent, this should be written at the top left corner in capitals.

- If the letter is private then this should be written in capitals 2 lines above the addressee's name

- Good practice includes writing neatly, no punctuation at the end of each line

- Other countries may layout their addresses differently to the UK, you must make sure you know what the layout is if sending abroad.

URGENT

                           PRIVATE AND CONFIDENTIAL

                           Miss L Taylor
                           Teacher of Business Education
                           Gracemount High School
                           136 Lasswade Road
                           EDINBURGH
                           EH16 6TZ

Royal Mail Postal Services

Royal Mail 1st class Next day delivery aim for urgent mail.		Royal Mail 2nd class Delivery in 2-3 working days for less urgent mail.	
Royal Mail Signed For 1st class Signature on delivery and next delivery aim.		**Royal Mail Signed For 2nd class** Signature on delivery. Delivery in 2-3 working days for less urgent mail.	
Royal Mail Tracked 24 Tracking to delivery point and next-day delivery.		**Royal Mail Tracked 48** Tracking to delivery point. Delivery in 2-3 working days for less urgent mail.	
Royal Mail Sameday Same day delivery for urgent items. Tracking to delivery point, e-mail delivery confirmation.			
Royal Mail Special Delivery Guaranteed by 9 am. Track and trace, signed on receipt, delivered by 9 am.		**Royal Mail Special Delivery Guaranteed by 1 pm** Track and trace, signed on receipt, delivered by 1 pm.	

The cost of these services depend on the size and weight of the letter/parcel. They generally fall under 5 categories –

- Letter
- Large letter
- Small parcel
- Medium parcel
- Tubes and rolls

If the size/weight of the parcel is greater than these services offer Parcelforce or other couriers can be used.

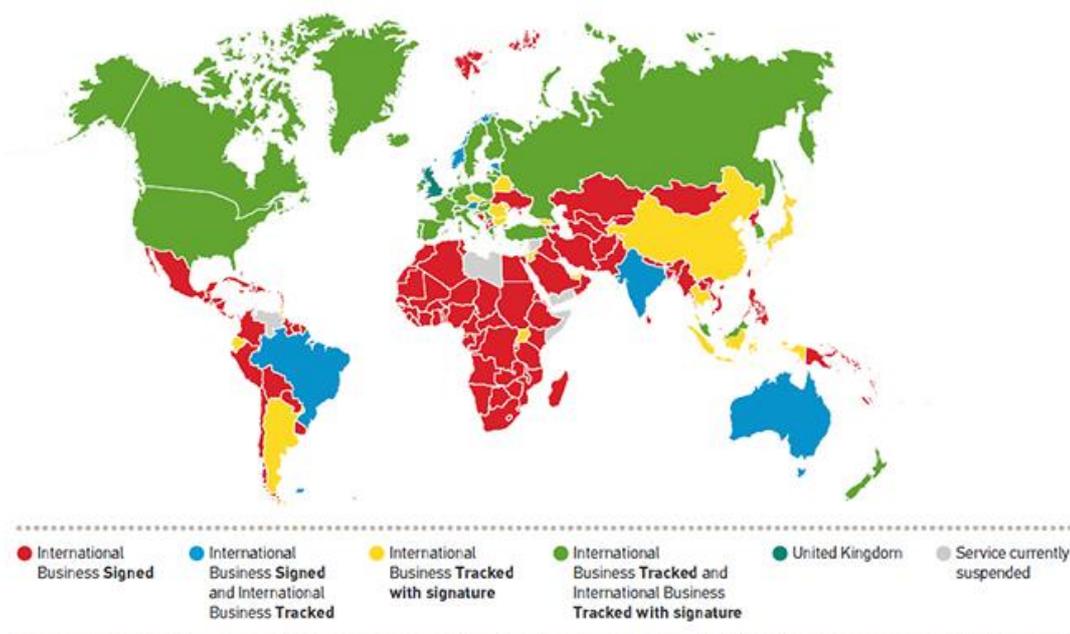## Royal Mail Business Response Services

These services encourage customers and potential customers to respond quickly and easily by supplying them with a pre-paid, pre-addressed envelope. These services include Business Reply (where the response licence detail is printed at the top left of the envelope and return address in the centre) or Freepost (where the response licence detail and return address are printed together in the centre of the envelope)
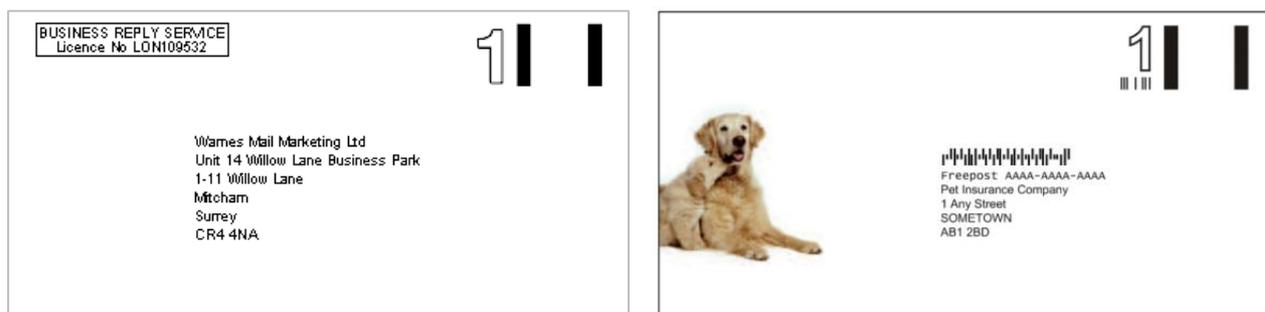
Royal Mail International Business Services

Royal Mail offer a variety of services for sending letters and parcels from the UK worldwide. The delivery aims of these services are between 2-15 days depending of urgency levels. The services also include options for tracking to delivery and signing upon delivery in certain countries.

Service availability map

- ● International Business **Signed**
- ● International Business **Signed** and International Business **Tracked**
- ● International Business **Tracked** with signature
- ● International Business **Tracked** and International Business **Tracked with signature**
- ● United Kingdom
- ● Service currently suspended

Mail Handling Tasks

Q1	Match the following definitions with the terms below	3
	mail sent and received from within the organisation	
	mail that comes into the organisation from external sources	
	mail (letters, parcels, faxes) that are sent from the organisation to external sources	

Incoming mail	**Outgoing mail**	**Internal mail**

Q2	Idenitfy 2 examples of the type of mail that may be received by an organisation.	2

Q3	Identify 2 examples of the type of mail that may be sent by an organisation (your answers must be different to Q2).	2

Q4	Identify 2 examples who the organisation may receive mail from or send post to.	2

Q5	Choose the 3 pieces of mail room equipment that you think are most important. Explain why each piece chosen is important.	3
1		
2		
3		

Q6	Choose 3 pieces of mail room equipment and research their cost and where to buy. Make a note of your findings below (you can include graphics if you choose).	3
1		
2		
3		

Q7	Describe 2 advantages of using e-mail to send mail instead of a postal service.	2
1		
2		

Q8	Describe 2 advantages of purchasing a photocopier than can print, scan and fax as well as photocopy rather than purchasing 4 individual pieces of equipment.	2
1		
2		

Q9a	The mail department of Henderson Brothers, a large engineering firm, is responsible for delivering mail from that comes into the organisation to departments and individuals. List 6 procedures, in the correct order, that should be carried out in the mail room from receiving the mail to delivering within the organisation.	6
1		
2		
3		
4		
5		
6		

Q9b	The mail department of Henderson Brothers, a large engineering firm, is responsible for collecting mail from departmental out-trays inserting mail in envelopes and delivering the mail to the Post Office. List 4 procedures, in the correct order, that should be carried out in the mail room from collecting the mail from out-trays to delivering the mail to the Post Office.	4
1		
2		
3		
4		

Q10	The following problems have been noted when opening incoming mail in the mailroom of Hardy's Food Supplies. *Describe how each of the problems below should be dealt with by the mailroom staff.*	3
1	A highly confidential letter was opened in error.	
2	The amount on a remittance (cheque) was found to be different from the amount stated in the covering letter.	
3	After opening all the mail the mailroom staff found that the second page of an important letter was missing.	

Q11	An organisation is finding the following problems with its <u>internal mail</u>. *Describe a procedure for dealing with each of the problems below.*	4
1	Some items of urgent mail are taking a long time to be delivered.	
2	Some items of mail which should be circulated to a number of people are not being passed on.	
3	There have been occasions when private mail has been read by the person delivering the mail.	
4	Documents relating to a particular subject sometimes become separated and go missing.	

Q12	The following graphic shows part of a fax cover sheet. Identify 3 other pieces of information which should have been included on the cover sheet.	3

McDonald & Simpson	34 Beveridge Street Edinburgh EH1 8KL	tel: 01314146000 fax: 01314146411 e-mail: info@mcdonaldsimpson.com

Fax Cover Sheet

To	Sam Ryan
From	Laura Williams

1	
2	
3	

Q13	When you return from your holiday week (last week) you find out that no-one filled in the Remittance Book. Instead you were left post-it notes and e-mails about remittances received in your absence. *Complete the Remittance Book using the information provided.*	4

REMITTANCE BOOK				
DATE	SENDER	REMITTANCE	AMOUNT	SIGNATURE

Cheque for £50 from Jane Paul on Monday

Cheque received from Top Tools for overpayment of account. Cheque received on Wednesay. £43.50.

Mrs Potts sent in a postal order to the value of £49.99 on Thursday.

To:	Mailroom Supervisor
Subject	Remittance
From:	Mailroom Assistant

Send   Attach ✏️

Hi

I hope you had a good holiday. I couldn't find the Remittance Book last week, so when I opened mail that had a cheque in it I just passed it straight to the cashier. The letter was from Mr G Brown. He was sending in payment for his last invoice. He sent in a cheque for £174.50. This happened on Wednesday.

Thanks

James

Q14	**The following items have to be dealt with by the staff of Braw Ideas, a large advertising agency in Stirling.**	**6**
1	An urgent message has to be passed to the Managing Director, outwith office hours, to inform her that the firm's office has been broken into and some papers have been stolen. The Managing Director is not at home.	
2	Printed invitations to attend the firm's silver anniversary dinner next week have to be sent to important customers.	
3	The Marketing Manager, who is attending a meeting with a scutomer in Glasgow, has forgotten to take A4-sized sketches of a new product range and requires them urgently.	
4	A monthly update on vacancies within the organisation has to be sent to Heads of Departments.	
5	End-of-month statements have to be sent to customers.	
6	A reference for an employee, who is attending a job interview tomorrow, has to be sent to the Edinburgh branch of Braw Ideas.	
a	**Identify an appropriate method of sending each of items (1-6) above. Try not to use the same method more than once.**	
b	**Outline reasons for choosing each of the methods identified in (a).**	

	Method of Sending	*Reasons*
1		
2		
3		
4		
5		
6		

Q15	The following methods of communication are available to an organisation based in Glasgow.	5

- **Royal Mail postal services**
- **Courier**
- **E-mail**
- **Internal Mail**
- **Voicemail**
- **Fax**
- **Phone – land line and mobile**

Identify and justify a method of communication to be used for sending each of the following:

1	A personal invitation to a new customer inviting the customer to lunch.
2	An urgent message to senior managers cancelling a meeting tomorrow morning.
3	A spreadsheet file which is required urgently by an executive who is working from home.
4	A legal contract which has to be sent immediately to the firm's solicitor who are also based in Glasgow.
5	An urgent order to an office supplies firm for toner for the office's laser printer.

	Method of Sending	*Justification*
1		
2		
3		
4		
5		

Q16	**Although many organisations use address printers to print addresses onto envelopes or print addresses onto labels, some still address the majority of envelopes by hand. Using the information below, address the 2 envelopes underneath.**	2
1	Mrs Julie Shepherd, 14 Highbury Rd, Edinburgh, EH6 9SD	
2	David Williams, 15 Beveridge Dr, Ipswich, Suffolk, IP2 8JD	

Q17	How many mistakes can you spot in the following envelope. You should find 8. List the errors below.	8

PERSONAL

Nicky Escreet
    15 Juniper Road
    EDGEHILL
    Liverpool
    <u>L20 9JF</u>.

1	
2	
3	
4	
5	
6	
7	
8	

Q18	Choose one Royal Mail postal service from pages 9 &10 and create a poster to advertise this service. The following weblinks may be helpful. https://www.royalmail.com/sending/uk https://www.royalmail.com/business/international/services