



E-LEARNING

Level 2



**Co-funded by
the European Union**

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them.

WA 01: Office Procedures

2.1. Handle the mail and the stock

LO2.1: Demonstrate ability to describe and follow the procedure through which the organization handles incoming and outgoing mail

LO2.2: Demonstrate ability to arrange incoming mail appropriately (control of documents, delivery to the right persons, etc.)

LO2.3: Demonstrate ability to collect, arrange and dispatch outgoing mail accurately

LO2.4: Demonstrate the ability to explain, describe and follow the stock control procedures that apply in the office in order for the office to run smoothly. Recommend improvements to these procedures.

LO2.5: Demonstrate the ability to maintain the right level of stock needed to run the office smoothly using specific procedures and tools

What we mean by the term mail

- Anything that arrives to the office through:
 - Post
 - Fax
 - Courier
 - Email
 - etc



Handling mail

- Sorting the mail
- Distributing it to the proper departments or person
- Opening the employer's mail
- Prioritizing
- Gathering necessary preliminary information to answer specific requests or solve problems.



What the policy of handling mail usually includes

- A company policy of handling incoming mail includes:
 - Who collects it
 - What they do with it
 - Record?
 - Copy and distribute?
 - Stamp, copy and distribute?
 - Just distribute?
- No right or wrong as long as a policy exists
 - Usually, a trade-off between administrative work (that is time spent) and ability to trace back a mail item



What a policy of handling mail usually includes

- Handling **Outgoing Mail** - Company Policy includes:
 - Who can send outgoing mail
 - Who is responsible for mailing
 - Ensures that a system is in place to track outgoing mail.
- No absolute right or wrong: The existence of a policy does not imply a single correct approach; different companies may have varying procedures.
- **A Trade-Off:** Implementing a policy involves balancing efficiency, security, and administrative oversight.



Why it is important?

- Mail is an important method of communication between a company and the outside business world.





- Scenario A:
 - A customer has sent a request of proposal by mail.
The person responsible for the distribution delayed to deliver it.
 - **Result:** We missed the deadline to submit the offer.
 - And... We did not even respond to the customer.



- Scenario B:

- A supplier has sent an invitation to our manager for a cocktail party.
The invitation never reached our manager's desk.

Result: The manager missed the party and did not even reply to the invitation.



- Scenario C:
 - Our banker requested our financial statements, to be sent via fax, in order to renew our facilities for the next year.
He did not receive them.
 - **Result**: Facilities were not renewed.

Why it is important - Consequences



- Therefore, mail handling affects:
 - Our business development
 - Our operations
 - Our image.



Inefficient handling operations have very important consequences:

- Missing a deadline
- Pending payments
- Attachments missing
- Junk/suspicious mail



Methods for checking mail may vary from office to office. Processes can always be reviewed and improved for greater efficiency and security.

- Describe different types of procedures
 - Outline and explain various types of procedures relevant to the topic.
 - Use visual aids, such as **flowcharts**, to illustrate each procedure clearly.
 - Draw the flowcharts on a **flipchart** to facilitate discussion and understanding.
- Identify simple improvements for the procedures

Methodological Tool I



Identify the company policy
E-EUPA_LO_2.1_M_001

- Control of documents

- Whatever type of document reaches the office, is stamped with the date and the person to whom it must be distributed.
- Before distribution, the document is copied and stored in a file. In this way, the company keeps an extra copy of all the documents and also keeps track of the person to whom the document has been delivered. Moreover, this practice, removes any suspicious documents.



- **Effective recording of incoming mail:**
 - Keep an excel file or a word table and add an entry each time a document reaches the office.
 - The entry should include:
 - Date
 - Sender
 - Recipient
 - Subject
 - To whom it has been delivered



- Guidelines for data protection and confidential documents:
 - Post should be opened away from public areas.
 - Where confidential mail is received e.g., marked Personal, Private & Confidential, In Confidence etc. this should only be opened by the addressee unless authority has been delegated.
 - Post 'In/Out' trays must be sited away from the general public and stored in an area with controlled access.



- Guidelines for data protection and confidential documents:
 - Request that external organizations use secure post facilities;
 - either Recorded (signed for) or
 - Special Delivery, (tracked and signed for) or
 - Private courier
 - They should also use tamper-evident packaging so one can see if the package has been accessed inappropriately.



- **No Sender Address:** Mail without a return address is often unsolicited.
- **Unknown Sender Location:** If the sender's address is from a country your organization does not work with, it may be junk mail.
- **No Recipient Name:** Generic or missing recipient names often indicate advertising material sent to the organization.

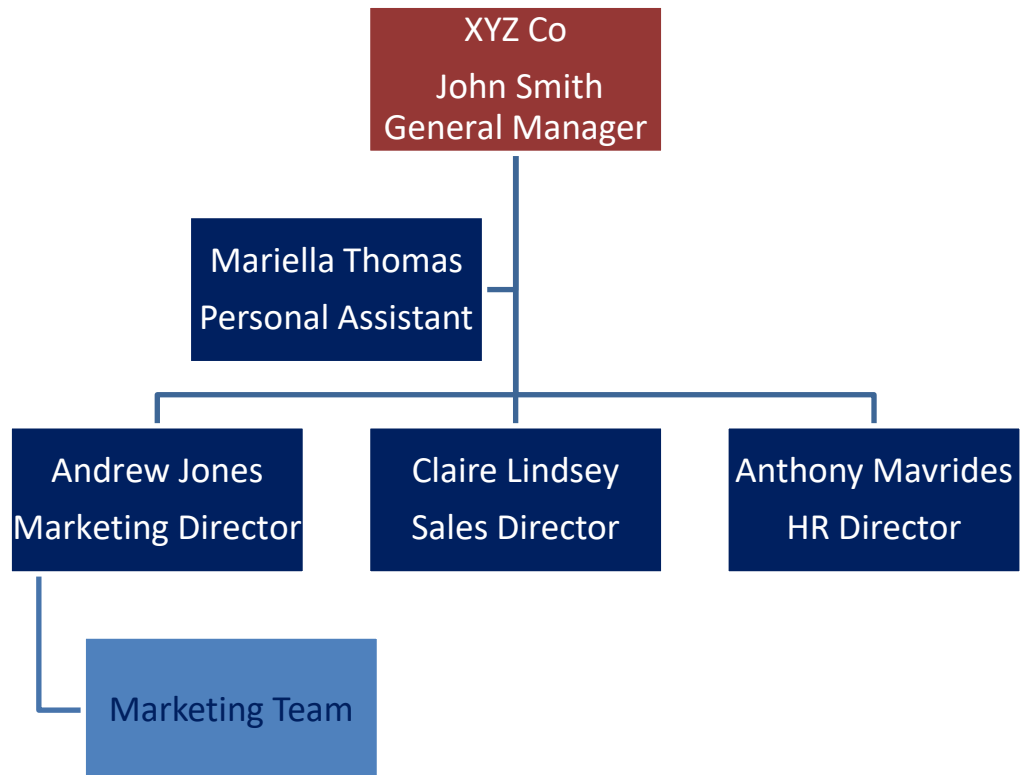




Handling incoming mail

E-EUPA_LO_2.2_M_001

Identify the appropriate recipient



In the mail received there is a request for a sponsorship for an event that will be organized for the orphans. The mail is addressed to the General Manager of the company (no name is provided).

Where will you direct the mail to?

- Collect mail from co-workers.
- Register mail on a control registry of outgoing mail including information such as:
 - Sender
 - Recipient
 - Subject
 - Method of dispatch



Email Policy



- Sort mail according to the dispatch method (post, courier)
- Prioritize – identify urgent mail
- Ensure that dispatch price is within the agreed budget
- Arrange services for collection of outgoing mail



Email Policy



- A company is judged...

...By the way its envelopes are addressed.

- It does not just create a good impression; it affects whether the mail is delivered on time too.



- Things to take into consideration:
 - Use a clear font that is easy to read.
 - Use an appropriate font size.
 - Ensure that address is visible through the window of the envelope.
 - In case of foreign mail, ensure that you also have the correct country name.
 - Ensure you use the appropriate spacing between characters, words and address lines.



Addressees' name
House number and street name
Locality name (if needed)
Town (please print in capitals)
Full postcode (please print in capitals)

- Don't use full stops or commas.
- Start each line on the left (don't center the lines).
- You don't need to write the name of the country if you've included the town and postcode.



Update your address lists often

- Recommendations list
- Standardise the address list making sure that you have all the information.
 - Ensure postcodes are correct.
 - Correct any spelling mistakes.



- In general, it's illegal to send by post anything that can harm, injure or deathly injure a person, or obstruct mail service or damage property.
- Harmful or dangerous objects/ items include, but not limited to, the following:
 - All poisonous (toxic) or infectious substances
 - All living creatures, like turtles, spiders, snakes
 - All pathogens that can cause disease, like a virus
 - All explosive items, flammable material or chemicals



- Legal restrictions are also placed on items such as the following:
 - Firearms, knives and sharp instruments.
 - Drugs and narcotics.
 - Vehicle master keys.
 - And others.



Different types of mail services

- Mail services differ between countries.
 - Express mail
 - Priority mail
 - First class mail
 - Registered mail
- Courier services decision depends on:
 - Available budget
 - Requested time of delivery
 - Importance of the document



- Check the address twice.
- Take into consideration the urgency of the mail.
- Take into consideration the available budget.





Handling Outcoming mail

E-EUPA_LO_2.3_M_001



Handling International mail

E-EUPA_LO_2.4_M_001

- **Audiovisual Supplies and Equipment**
 - Presentation tools, Wallboards, etc.
- **Calendars**
 - Planners, Diaries etc.
- **Basic Supplies and Labels**
 - Mail supplies, Cash boxes, Memos, etc.
- **Break room and Safety**
 - Cold beverages, cups, plates, first aid supplies, etc.
- **Business Cases**
 - Briefcases, Travel accessories, Portfolios, Computer's bags, etc.
- **Cleaning Supplies**
 - Air fresheners, brooms, glass cleaners, trash cans, etc.



– **Organizers and Desk Accessories**

- Desk trays, Desktop sorters, etc.

– **Custom Printing**

- Labels, stamps, Business Cards, Envelopes, etc.

– **Filing, Binding, and Storage**

- Boxes, Binders, Files, etc.

– **Hardware**

- Heaters, Light bulbs, Ladders, Batteries, etc.



Before ordering

- Search for the best prices
- Get to know your suppliers
- Order stationery stock from suppliers within limits of budget allowed
- Chase up orders with suppliers



Accepting deliveries


- Check incoming deliveries with the correspondent orders and report any problem.



Storing

- Keep the stock in a safe storage space.



- 
- Stock taking is the physical counting of quantities and condition checking of items held in an inventory or warehouse.
 - This may be done to provide an audit of existing stock.
 - It is also the source of stock discrepancy information
 - Keep always stock records accurate, legible and up to date

Monitoring

- Check if stock quantities are adequate for the office to run always smoothly
- Maintain stationery stock items to the required levels
- Become familiar with the daily/monthly office supply needs
- Keep in mind the organization procedures used to monitor supplies



Disposing

- Who has the authority to dispose things
- How do you dispose?
 - Sell
 - Destroy?
 - Other?



Keeping stock secure demands knowing:

- What you have
- Where it is located
- How much it is worth - so good records are essential

Thieves and shoplifters

- An outside thief is an obvious threat.
 - In this case check your perimeter security.
- Theft by employees can be a serious problem.
 - Train staff about your security policies and procedures
 - Staff with financial responsibilities should not oversee stock records
 - Restrict access to warehouses, stockrooms and stationery cupboards.

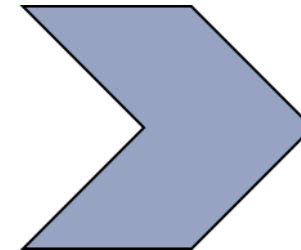


- **Advantages**

- Efficient and Flexible
 - You only have what you need, when you need it
 - Lower storage costs
 - You can keep up to date and develop new products without wasting stock

- **Disadvantages**

- Meeting stock needs can become expensive
- Run out of stock
- You depend on the efficiency of your suppliers



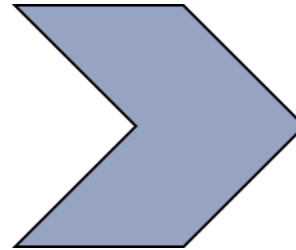
This might suit your business, if it is a fast-moving environment where products develop rapidly, and the stock is expensive to buy.

- **Advantages**

- Easy to manage
- Low Management Costs
- You never run out
- Buying in bulk may be cheaper

- **Disadvantages**

- Larger storage
- Certain goods might perish
- Stock may become obsolete before it is used
- Your capital is tied up



This might suit your business, if sales are difficult to predict and it is hard to pin down how much stock you need and when.



Pros of handling the stock in the right way

- **Keep an inventory**
 - What is the use of specific office supplies?
- **Identify suppliers in a proper way- better quality/prices**
 - Price, requests, frequent communication
- **Order stock according to required levels**
 - Receive confirmation from suppliers, chase up orders



The importance of procedures

Procedures:

- Identify **specific actions**
 - How you keep track of stock
 - How you grasp manager or colleagues needs
 - How you place the order
 - Who signs/approves the order
 - Explain **when to take actions**
 - Describe **alternatives**
 - Show emergency procedures
 - Include warning & cautions
 - Give examples
 - Show how to complete forms
- Procedures are usually written in an outline format





An inventory control system does far more than keeping count.

- It's a tool that an organization uses in accounting, stock planning, replenishment and forecasting.
- An inventory system may be as simple as a clipboard with checkmarks, or as complex as an automated system, interfaced.
- Sometimes a clipboard is good enough, but large operations require more sophisticated systems.

“Well written procedures allow employees to understand their roles and responsibilities within predefined limits”.

Minimum stock level

- You identify a minimum stock level and re-order when stock reaches that level. This is known as the re-order level.

Stock review

- You have regular reviews of stock. At every review you place an order so that stock reaches a predetermined level.

Basic forecast

- Use historic data to identify demand patterns and order accordingly

Just in time

- Inventory is ordered as needed- Not appropriate in case of office administrators

Fixed order quantities

- A specific number of items is ordered when an order point is triggered

Economic Order Quantity

- Aims to establish stock quantities at the lowest possible costs.



Stock control methods

Manual

- Stock book/stock cards
- A simple reorder system

Computer based

- Everything is done automatically and
- The same system reminds us to place an order



Control your stock - Possibilities for PAs

- Design the right template in an Excel sheet depending on the organization needs
- Use a typical clipboard and a pen to write everything down
- Use PADs/ electronic devices to allow a detailed analysis of item performance
- Know our colleague's daily needs



For example:

*MMC uses on average 50
packets of paper per week.*

*Paper is ordered every
Wednesday and the supplier
does not accept orders on
any other day.*

*Today is Tuesday afternoon
and we have 20 packets left.*



Which of the following
would you choose?

- a. Order 10 packets
- b. Order 30 packets
- c. No need to order now. Let's wait until Friday



Follow the company procedures

- Monthly stock taking- Recording the stock
- Order stock according to required reorder levels (receive confirmation from suppliers, chase up orders)
- Disposing stock that you do not need
- Keep record on how much stock you use so that you can adjust minimum reorder levels
- Keeping stock in the designated storage area ensuring that the conditions are good so that the stock will remain in a good condition
- Identify suppliers
 - Market research
 - Price requests
 - evaluate communication
 - references



Methodological Tool V



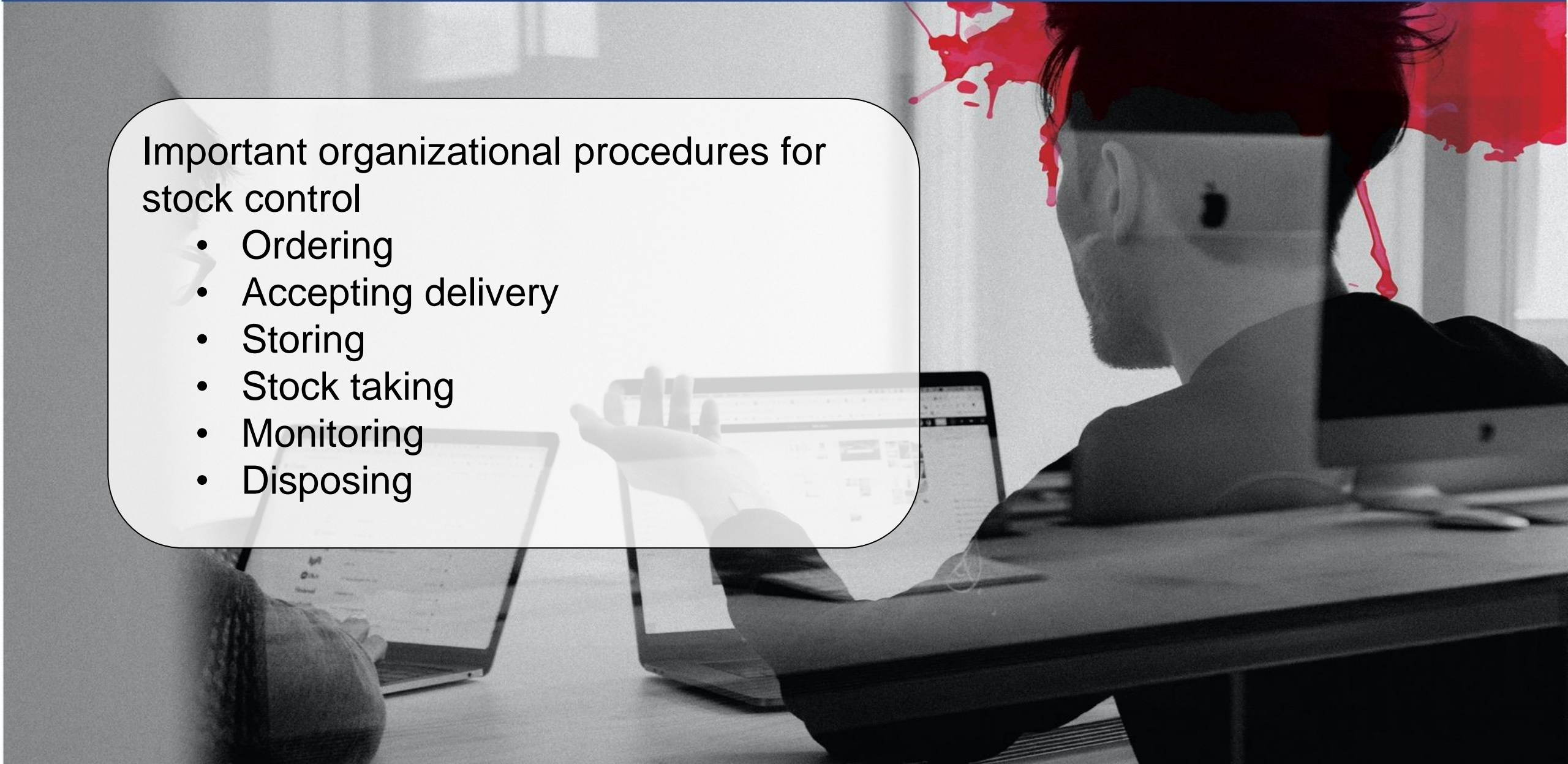
Maintain stock level

E-EUPA_LO_2.5_M_001

Module Key points

Important organizational procedures for stock control

- Ordering
- Accepting delivery
- Storing
- Stock taking
- Monitoring
- Disposing



Revision Questions

Revision Question 1

Describe a general organisational procedure for handling incoming mail

Revision Question 2

Describe a general organisational procedure for handling outgoing mail

Revision Question 3

List main principles that need to be followed when dealing with confidential mail

Revision Question 4

List available methods for dispatching mail

Revision Question 5

Outline organisational requirements for ordering, accepting delivery, storing, monitoring and disposing stock

Revision Question 6

Outline the procedure used for ordering from a specific supplier

Revision Question 7

Calculate the right level of stock needed to run the office smoothly

Revision Question 8

Outline the advantages of having procedures for stock control

Module Key points

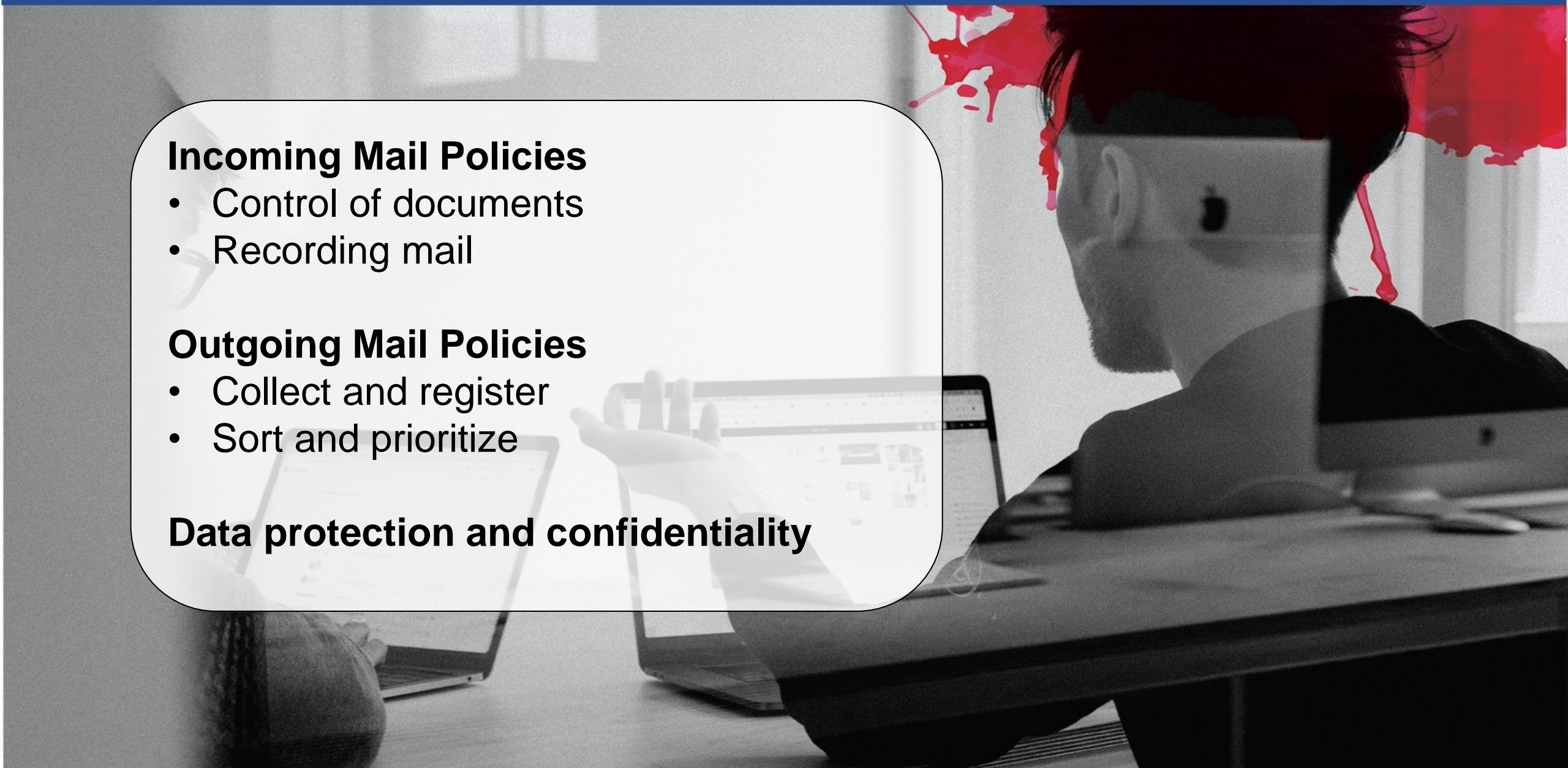
Incoming Mail Policies

- Control of documents
- Recording mail

Outgoing Mail Policies

- Collect and register
- Sort and prioritize

Data protection and confidentiality



Module Key points

List advantages of applying stock control procedures

- Always have stock
- Can meet deadlines

Possible stock monitoring procedures

- Minimum stock level
- Stock review
- forecast



WELL DONE

You have completed Unit 2.1



**Co-funded by
the European Union**

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them.

