Classify incoming mail

2.2.2.1 Introduction to the learning outcome

This unit covers competencies required to receive, sort, open, removal of content, record and date stamp incoming mail.

2.2.2.2. Performance Standard

2.2.2.2.1 Incoming mail is received as per the SOPs

2.2.2.2.2 Office mail is sorted based on the ***type***

2.2.2.2.3 Incoming mail is opened as per the SOPs

2.2.2.2.4 Content of the mail is removed as per the SOP

2.2.2.2.5 Incoming mail is recorded based on (date reference number, subject) as per the organization requirements

2.2.2.2.6 Incoming mail is date stamped as per the work place procedures

2.2.2.3 Information Sheet

Definitions of terms

Incoming Correspondence: This is the correspondence that an organization received from outside.

Correspondence: It is any written or digital communication exchanged by two or more parties. They may come in form of letters, emails, text messages and notes.

Circulation slip: It is a list which shows the order in which the correspondence should circulate.

Personal correspondence: It is any communication addressed to a specific name. It is also known as private or confidential correspondence.

Business Mail: The letters addressed to the company

Inward Mail Register: This is the register or book where all non-personal incoming mail is recorded which indicates particulars such as date of receipt, addressor, addressee, subject and to whom it is issued.

Classification of office correspondence

Office correspondence can be classified into two

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1. Personal correspondence

2. Business Mail

Mails may be divided into three parts namely:

1. Incoming Mail

2. Outgoing Mail

3. Inter-departmental Mail (within the department)

Types of office correspondence

1. Correspondence may be external and internal. External correspondence is that between the organizations and the outsiders e.g. other firms, organizations and companies. This means that all the letters received from and sent out to other firms will be considered as external correspondence.

2. Internal correspondence means the correspondence is between the departments of the company, branches and head office of the same organization.

Incoming mail

This section handles all the correspondence coming to an organization. A well-designed procedure should be followed for proper handling of mails

Steps of handling incoming mail

Collection

Most businesses received at least two mail deliveries from the post office on daily basis. For large organizations, they may collect their mails at regular intervals throughout the day for the purpose of distributing the workload evenly throughout the day among the personnel. This eases the work even during peak hours. Mails may be collected from the post office by any of the following personnel:

(a) Office Messenger

(b) The driver who may pass through the post office as he undertakes other office duties.

(c) The mail van that is usually assigned the work.

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Sorting

All letters should be sorted which should be guided by the following rules: (a) Sort out mail into personal and non-personal mails. Personal mails are those addressed to a specific name while non-personal are those mails addressed to the company.

(b) The personal mail should be sorted into respective departments where a respective individual work in. The letters should be ready for distribution at this stage.

(c) Non-personal letters should be sorted in the following order:

i. Remittances such as cash, cheques, postal and money orders.

ii. Confidential letters iii. Materials or letters that require immediate attention iv. Routine mail

Recording inward mail

In small departments, a book may be kept to record all incoming mail. This may not be the case in other organizations but they record at least those letters with enclosures such as cash or cheques. It is important to record non-personal mail in the inward mail register and all remittances in the remittance inward book. It indicates the date of receipt, addressor, addressee, and subject and to whom it is addressed.

Inward register mail

Table 6

DATE ADDRESER ADDRESSEE SUBJECT TO WHOM IT IS ISSUED TO

Source: Author

Remittances inward book

This is the book where the receipt of stamps, postal orders, money orders and cheques are usually recorded. It contains details such as: date, sender, method of payment (cheques) amount, cashier's signature, opener initials and total for the day.

REMITTANCES INWARD BOOK

Table 7

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DATE SENDER METHOD OF PAYMENT AMOUNT CASHIER'S

SIGNATURE

Daily Total

OPENER'S INITIALS…….

(a) When handling remittances, the personnel handling them should ensure the following rules are observed:

(b) Documentary amount should be compared with the remittances received.

(c) In case of any discrepancies, it should be reported immediately.

(d) The cashier should sign remittance inward book to confirm receipt of such payments.

(e) The cashier should sign for postage stamps after which they should be forwarded to the post department for use.

Removal of contents from an incoming mail

Once the non-personal mail is opened, the contents should be removed from the envelopes.

Contents include the letter itself and enclosures if any. The following rules should be observed in the removal of contents.

(a) Make sure the table is clean. This will help one not to mix the contents.

(b) Handle one letter at a time

(c) After removing the contents from the envelop pass it in front of light to make sure that no enclosure is not overlooked

(d) Use paper clips or staples to secure enclosures to their accompanying letters.

(e) If you notice that an envelope is missing, recheck the envelope and if one cannot find it, note it on the letter.

(f) Sort the letters together with their enclosures into first bunch or second bunch.

Distributing of incoming mail

At regular intervals, messengers are required to clear the sorting racks and trays and deliver the mails to various departments, sections and offices. For faster distribution, the following rules should be followed:

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(a) Read and check the text of all recorded and date stamped letters in order to decide to whom it will be delivered.

(b) Send all the remittance to the cashier

(c) Route orders to the sales department

(d) Send application letters to the personnel department

(e) Send salary claims to the salaries and wages department

(f) Refer quotations and estimates to the purchasing department

(g) If the matter is to be dealt with by many officers, one can prepare a circulation slip.

Circulation Slip

Table 8

Circulation Slip Title……

Please read the attached document and pass it on the next person listed

Name Date cleared Action taken

Received by Mail Department and

circulated on:

Mail room equipment and machines

- If several hundreds of letters have to be handled each morning and as many sent out each afternoon, the mailing department needs, above all, some long tables or counters which can be kept clear for this work

- Along the back of one or more of these tables there will be trays or pigeon-holes labeled with departments and individuals names to take the documents after they have been sorted and stamped

- Cupboards built beneath one of the workers could be used to house packing materials such as brown paper, string, gummed paper strips, self-sealing paper tape, sealing wax, corrugated cardboard, etc

- A shelf on the post office guide could be kept. It is an official handbook of the post office and is published periodically. It gives full particulars of the principal services and charges together with street directories, maps, bus, rail, air timetables and any other reference books that prove useful

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- Two smaller tables could be provided – one for the supervisor or chief clerk and one to house the franking machine, scales, stapling machines and other small equipment. If any petty cash is kept, it should be locked in a cash box kept in the supervisor's drawer

- A place must be reserved for the empty manila envelopes used for the internal mails if this system is used. Trays or pigeon holes are needed for branch communications where these existed.

- Table or floor space are necessary, must be provided for any letter-opening, folding or sealing machinery that may be used

- A few chairs will be needed for at the two smaller tables and some stools of an appropriate height to be used at the sorting tables

- Important small items such as the date stamp, paper knives, air mail stickers and other special labels should be kept together in an easily accessible place

- Wire trays and baskets – used to handle correspondence that has been sorted and each marked with departmental name

- Trolleys – used to take mail around the building to the people concerned. If there is a lot of for one person, place the mail in a folder with his name on it

- Pigeon holes – these are labeled alphabetically for various executives or departments. Mail is placed into the correct hole after sorting

- Desk sorter – for placing letters and documents related to one department onto one panel of the desk sorter

- Paper clips – is an instrument used to hold sheets of paper together, usually made of steel wire bent to a looped shape

- Punch – used to put holes in a document ready for filing

- Paper knife – for opening business envelopes

- Letter opening machine – used to open envelopes when the number of letters received is large, that is, 100 or more to save time

- Time and date stamping machine – used to time and date stamp all documents removed from the envelope

- Letter folding machine – used when a large number of letters or documents require folding so as to save time

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- Letter inserting machines – used to insert folded letters into envelopes at a great speed

- Folding and inserting machine – for folding and inserting letters into envelopes at great speed

- Addressing machines – used to print names and addresses of regular customers or correspondence. The master is prepared in the form of stencils, spirit masters or metal plates. They are then passed through the machine for printing on envelopes

- Envelope or automatic sealing machines – used to seal envelopes when the quantities of envelopes are large

- Composite machine – this performs three functions, namely, folds the document, inserts them in envelops and seals the envelops

- Stamp emitting machine – rolls of postage stamps can be bought for use from these machines

- Stamp fixing machine – when a envelope is placed under the machine a stamp is automatically moistened and affixed on the envelope

- Stapling machine/stapler – this is used for affixing letters and enclosures or other pages together

- Sponge and roller moistener – stamp moistening device for wetting stamps or envelopes to affix or seal

- Guillotine – for cutting and trimming papers to the required size

- Shredder machines – destroys secrets and confidential material if no longer required

- Jogger – vibrate papers together into alignment before fastening i.e. stapling or binding - Collating machine – assembles duplicated documents comprising a number of pages such as s report before being fastened together

- Letter or parcel scales to weigh correspondence to ensure correct postage

- **Franking machines**– are used for large quantities of outgoing inland and/or overseas post. It quickly records the value of postage on envelopes or on adhesive labels for parcels. The machine is usually reset at the post office on the payment of some money in advance and once the total postage paid for is exhausted the machine locks itself and has to be reset again at the post office. Letters passed through the machine emerge stamped with the postage paid, a

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date, cancellation mark and also if desired, an advertisement. The postage printed is changed by the setting of a lever to the correct figure and the meter on the machine records the value of the postage

Advantages of franking machines

- It saves time and labour because it can frank many letters within a very short time
- It facilitates greater security as opposed to lose stamps which can be stolen or lost. The machine can be locked to prevent unauthorized use
- Better control of expenditure/money as the machines shows at a glance the amount used and the balance at hand
- Advertising slogans and the senders address can be printed with each and every franking and this saves printing costs/advertising costs
- Speedy dispatch of mail. Franked letters go to the sorting office for dispatch as they do not need to be cancelled, that is, date stamped
- Firms with a franking machine do not need to maintain a postage book as the machines meter indicates the amount of postage paid

Disadvantages of franking machines

- Cost – money has to be spent on buying or hiring a machine. In addition, the post office requires users of machines to have them inspected and serviced regularly to ensure efficient operation. Repairs and servicing costs are forms of additional expenditure
- Inconvenience – franked envelopes cannot be posted in the same way as those with postage stamps affixed. They must be arranged with all the names and addresses facing the same direction, securely tied into bundles and handed in at a specific post office. However, if the post office is shut, franked envelopes may be posted in a post box, but it is necessary to first put them in a special envelope
- Doesn't provide a record of the letters posted
- It is uneconomical for small firms with fewer than 20-30 letters daily to have this machine
- Operators may waste postage by franking wrong amounts or by not producing legible impressions

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Date stamping of an incoming mail

It is very important to date stamp incoming mail so that you can have a date. Date stamping should be done at the right-hand corner. The rubber stamp should be changed every morning to the current date. The stamping may be done using dating, number and time recording machines. Such machines have devices of automatic change of figures with every stroke. In every article of mail received, a rubber stamp is fixed which contains the following:

(a) Serial number for the item received

(b) The time of receipt

(c) The initial of the post opener.

Importance of date stamping

(a) It indicates when the letter was received.

(b) It encourages prompt reply by reminding the person handling each documents of the time factor operative.

2.2.2.4 Learning Activities

Case Study

As a mail clerk in an organization, you are required to propose information about four machines of your choice used in handling incoming letters. Give information on

(a) Its purpose (b)

Its advantages

(c) How it is operated.

Practical Activities

The following correspondence was received in the morning's mail. State what action would need to be taken to deal with the following situations connected with incoming mail?

(a) Documents which have been received without their accompanying enclosures

(b) Postal packet which has not been stamped by the sender

(c) A letter which is for the attention of more than one person.

(d) Items which have been damaged because of poor packing by the sender

(e) An envelope which is marked URGENT for the attention of F. Ndwiga

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2.2.2.5 Self-Assessment

1. As a mail clerk, you will be expected to receive many mails in your organization. Which six steps would you take to handle these mails?
2. John has been engaged in the central mail room. What duties should he undertake?
3. An office receptionist may receive correspondence from the registry office. One is supposed to stamp the mails upon receiving them. What effects would an organization experience if the dates were not stamped on the correspondences.
4. As an executive assistant you discovered that your assistant keeps sorting mails in the wrong manner what are three demerits would an organization get from this.
5. Mary is an office administrator trainee who has come for a three months attachment in your firm. What three categories of mails will you induct him on?
6. You work as a receptionist in tropical limited, you have received different types of mails that need to be sorted, which three ways you would use to sort these mails?
7. Organizations handle many correspondences in their office. Jane is a newly employed office administrator, she received mails from Mwega company.

Advise her on the three things to consider when recording these mails?

8. A correspondence may require attention of more than one officer. In such a situation, a circulation slip is prepared. What contents are found in the circulation slip?

2.2.2.6 Tools, Equipment, Supplies and Materials

The following resources are provided

- Computers 0OK09KIM
- Mailroom table

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- Sorting trays
- Date/time stamp
- Addressing machine
- Franking machine
- Office glue
- Pin remover
- Stapler
- Paper punch
- Opening knife
- Internet connectivity
- Registers
- Stationery
- Signage
- Organization chart
- Reference materials
- Office memory aids
- Mailroom equipment

2.2.2.7 References

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