

# Faredeal®

## *concessions management system*



Faredeal® is a web-based concessions management system for use by, or on behalf of, unitary or county local government authorities. It is aimed specifically, but not exclusively, at managing the issuance of age-related and disabled persons bus passes as part of the English National Concessionary Travel Scheme (ENCTS).

Whilst the bus pass concession itself is a national scheme, each Authority may nevertheless operate its own 'rules and regulations' to some extent, such as expiry date setting or what is required by way of entitlement evidence etc. In particular, alternative concession type offerings are possible and currently, as well as managing bus passes, Faredeal® is supporting the issue of taxi vouchers, rail card exchange vouchers and various other discretionary concession types. These options are facilitated by the system's flexible, parameter-driven design.

Faredeal® is in daily use in 19 county/unitary Authorities, with virtually 100% availability, managing over 2 million customers.

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## Features & functions

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**Access/audit security.** Faredeal® is accessible through an individual username/password combination. The username/password rules are compatible with payment card industry (PCI) standards.

Six individual access authority levels ranging from Read Only capability through to full System Administrator level are available.

All transactions are logged, enabling full historic audit trail - who added/amended which customer record, who issued each concession, who recorded a particular note, who captured/imported the photo, and in all cases, at what date / time, etc.

**District/Borough identification** (within a county system) is handled automatically through the use of the Authority's own **LLPG/NLPG** data. This address gazetteer data is also used to facilitate complete, correct and consistent address entry.

**Data Entry** is simplified and supported by use of drop-down lists and default values. Field edit checks maximise the quality and integrity of the data. All fields that are essential to the justification and production of a concession are mandatory in the system.

The date of entitlement (concession **Start Date**) is automatically calculated for age-based passes using latest government rules.

The **Expiry Date** is set by default (manually overridden if necessary) in accordance with choice of preferred method - set to fixed date,

set to X months from entry date, or set in line with customer birthdays.

**Duplicate checking** is carried out at data entry. If the surname/gender/date of birth combination already exists then the User is notified to minimise duplicate record entry.

**Photo capture** is achieved in any of three ways: live capture via webcam, direct interface to scanner or the file import of an existing photo.

Any number of **Notes** can be added per customer record with date, time and username automatically applied to each note.

A straightforward **Search** function is available to locate existing customer/concession records via either customer number, concession number, surname, forename, date of birth, post-code or combination of such fields.

**Customer/Concession details** are displayed on a 'tabbed' page showing customers' personal details, photo, full concession history (including dispatch date/status) and Notes history, plus various 'buttons' to proceed as required with details editing or concession updating (i.e. replacements, renewals and cancellations).

Lost/stolen (etc) **Replacements** are easily handled, after locating the customer/concession record as described above. Note that the new issue means the existing pass is automatically and simultaneously cancelled and subsequently hotlisted.

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Stand-alone **Cancellations**, typically where the customer is deceased or has moved out of area, are equally easily handled, and the customer record is then set as inactive.

**Hotlisting.** Details of all ITSO bus pass cancellations are automatically transmitted to the HOPS for subsequent hotlisting with no additional User effort involved.

**Renewals** can be easily processed individually (similar to replacements), or handled en-masse as part of an automatic batch process.

Data/image transmission for **Fulfilment** (card printing, encoding and mailing) can be set to happen automatically overnight (cards being released 'x' days before the Start Date) to achieve optimum production and delivery times. Similarly, the ISRN and dispatch date responses from the Euclid card bureau are automatically processed back into Faredeal.

**Reports.** More than a dozen statistical reports are available to those Users with the appropriate access authority level. The reports can be viewed on screen, stored/printed as a pdf or exported into Excel. Examples include:

1. Current Concessions - summary of concessions current on a specified date broken down by Eligibility Category.
2. Postcode Analysis - summary of concessions current on a specified date broken down by Postal Area or Postal District.
3. Concessions Issued - number of concessions issued during a specified period broken down by New, Renewals and Replacements.
4. Expiry Profile - summary by month over the following twelve months of concessions due for renewal.

**Data Extract.** A flexible/powerful data extract facility exists allowing both choice of data fields to be included, stored in re-usable

'profiles', and records to be selected, based on setting comprehensive selection criteria. The extract data can be viewed on-screen and/or exported to Excel or txt files.

**Archiving.** As the data ages it is appropriate to remove old records from the live database. The facility exists to identify concessions expired or cancelled prior to a chosen date and to move them to an archive database. The data will still be accessible if required.

**Date of Entitlement Calculator.** When is a customer eligible for their concession? This function is automatic during data entry but a calculator is available on the Faredeal® menu for ad hoc use. It automatically calculates someone's entitlement date based on their date of birth.

**Data Cleansing.** Described in another fact-sheet, this process/service covers the identification and cleaning of duplicate customer entries, the mass processing of third-party supplied death records and updating of address entries based on Royal Mail data.

**National Fraud Initiative.** Euclid offers assistance with the biennial NFI exercise by creating (and uploading) the necessary Concessionary Travel NFI export and subsequently processing the NFI findings back into Faredeal®.

**Direct (customer entered) Online ENCTS Applications.** Faredeal® contains a seamless interface to the Unicard ConcessionCard online applications system. A real-time check against Faredeal verifies that the data conforms to its rules and ensures it is not a duplicate entry. Once approved by the ConcessionCard 'administrator', the record is automatically imported into Faredeal® with no additional User involvement.

For more information, please contact Geoff at [geoff@euclid.ltd.uk](mailto:geoff@euclid.ltd.uk)

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Euclid Limited, registered in 1988, specialises in the manufacture of smart / ID cards and supporting systems, including customer management. Its high volume manufacturing and encoding processes are based upon experience gained across national ID / driving licence projects. Having worked in the international market for many years, the company has focused since 2003 on secure smart / ID card technologies from enrolment & data capture through to card production and fulfilment. Euclid Limited is certified to ISO 9001, ISO 14001 and ISO 27001.



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