

HUMAN RESOURCES

EMPLOYEES - CUSTOM DETAILS

Custom Details can be set up to add information that you wish to keep note of but that is not default to the system, for example: an employee Contract Start and End Date, or an employee's Foreign Identity Document Number.

In the Custom Details screen, you can view a list of custom details set up on the system, these can be configured. You can <u>only</u> make changes in the **Detail Data** column in the data grid.

Ribbon Access: Finance and HR > Employees



1. The *Employees* listing screen will be displayed.

VIEW EMPLOYEE CUSTOM DETAILS

SELECT EMPLOYEE

- 1. Select the *row* of the employee whose custom details you wish to *view*.
- 2. Click on the *Custom Details* tile.



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				BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567			A
				BLY001	Arial Blythe	Arial@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A
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				DG001	John Twain	John@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A
Comp	etence		đ	DUT001	Bianca Du Toit	kameshni.pillay@co3.co.za	Belinda Sharman	Sales	031 123 4564	083 123 4567	1234	A
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			T	DUT004	Test Employee	Test@TEST ALPHA v2.4.0.0 DB.co.za						A
Payro	ll Data			DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						A
			4	DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	A
			4	E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						Α
				E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						Α
				EMP123	Carolina Suzzetta L	Carolina Suzzetta@TEST ALPHA v2.4.0.0	Bianca Du Toit					Α
				HAR001	Wesley Haynes	Wesley@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A
	m Detail			JO001	Sasha Jones		Bianca Du Toit	Sales				Α
				JOH001	Michael-Stark Johns.	Michael-Stark@TEST ALPHA v2.4.0.0 DB	Markus Arilius Ste					Α
				JU01	Judah Milne		Belinda Sharman	Sales				Α
				KES001	Julanda Kessler			Sales				Α
Loans				KHU001	Andile Khumalo	Andile@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				Α
				MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				Α
				MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					Α
				NDW001	Coo Nidwalano	anandahala ndwalana@co2.co.m		Color				

- 1. The *Custom Details for: []* screen will be displayed.
- 2. Pre-defined codes will be listed in this screen.

Note: If the custom detail code you wish to update is not in this list, then refer to <u>Adding</u> <u>Employee Custom Detail Codes</u>.

ADD CUSTOM DETAIL DATA

- 3. Select the *row* where you wish to *add* information.
- 4. Type in the information you wish to add in the *Detail Data* column of that row.
- 5. Note that you can <u>only add</u> information to the Detail Data column.



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SAVE CUSTOM DETAIL DATA

- 1. When you have added the new details,
 - In this example, the *Blood Type* information has been typed in.
- 2. Click on Save.



*		Custon	n Details for	: DUT001 - BP	0: Version	2.4.0.11 - Exam	ple Compa	iny				_	
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The details will be saved, and you will return to the *Employees* listing screen.

EDIT CUSTOM DETAIL DATA

SELECT EMPLOYEE

- 1. In the *Employees* listing screen,
- 2. Select the *row* of the employee whose Custom Details you wish to change.
- 3. Click on the *Custom Details* tile.



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Ov Hol	ertime and idavs			MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			A	
				TIM	Joseph Timber	Joseph@TEST ALPHA v2.4.0.0 DB.co.za						A	
				BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567			A	0
Cor	mpetence			E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						A	
, Ma	nagement			E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						A	
				MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				A	
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				DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						Α	
				DUT002	Tammy Du Toit	Tammy@TEST ALPHA v2.4.0.0 DB.co.za						A	
Bar				DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	A	
				THO001	Mary Thompson	Mary@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A	
				DAN001	Sabelo Danisa	Sabelo@TEST ALPHA v2.4.0.0 DB.co.za						Α	
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				BLY001	Arial Blythe	Arial@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A	
				KHU001	Andile Khumalo	Andile@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A	
Loa	ans			PIL001	Kame Pillay	kameshni.pillay@co3.co.za						A	U
200				REP001	Marc Repsold	marc.repsold@co3.co.za		Sales				A	
				STO001	Troy Stokes			Sales				A	
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				1001	Judah Milaa	indohm@toot.co.as.as	Polinda Charman	Color	09765/2210	1100224466	7		_

- 1. The *Custom Details for: []* screen will be displayed.
- 2. Edit the information you wish to change in the *Detail Data* column of that row. You can either backspace or highlight over the existing information and type in the new information.
 - In this example, the *Blood Type* is to be amended.



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SAVE CUSTOM DETAIL EDITS

- 1. When you are happy with your changes,
- 2. Click on *Save*.

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The edited details will be saved, and you will return to the *Employees* listing screen.

DELETE CUSTOM DETAILS DATA

SELECT EMPLOYEE

- 1. In the *Employees* listing screen.
- Select the *row* of the employee for whom you wish to *delete* custom detail information.
- 3. Click on the *Custom Details* tile.

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Hol	idays		MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			A	
			TIM	Joseph Timber	Joseph@TEST ALPHA v2.4.0.0 DB.co.za						A	
			BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567			A	0
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			E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						A	- 11
			MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				A	- 11
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			DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						A	- 11
			DUT002	Tammy Du Toit	Tammy@TEST ALPHA v2.4.0.0 DB.co.za						A	- 11
Bar			DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	A	- 11
			THO001	Mary Thompson	Mary@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					Α	- 11
			DAN001	Sabelo Danisa	Sabelo@TEST ALPHA v2.4.0.0 DB.co.za						Α	- 11
Cu	stom Details		NDW001	Sne Ndwalane	snenhlanhla.ndwalane@co3.co.za		Sales				Α	- 11
			BLY001	Arial Blythe	Arial@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				Α	- 11
			KHU001	Andile Khumalo	Andile@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				Α	- 11
			PIL001	Kame Pillay	kameshni.pillay@co3.co.za						A	- 11
Loa	51115 ⁻		REP001	Marc Repsold	marc.repsold@co3.co.za		Sales				A	
			STO001	Troy Stokes			Sales				A	
			30001	Sasha Jones		Bianca Du Toit	Sales				A	
<u> </u>			1001	Judah Milno	indahm@taat.co.za.za	Polinda Charman	Color	0976542210	1100224455	7		Ŧ

- 1. The *Custom Details for: []* screen will be displayed.
- Delete the required information in the Detail Data column of that row. You can either backspace or highlight over the existing information and press Delete on your keyboard.
 - In this example, the *Medical Scheme Name* is to be deleted.



		Custom Details for:	: MUD001 - BPO: Version 2	2.5.0.0 - Example (ompany v2.5.	0.0					
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SAVE DELETION

- 1. When you are happy with your deleted changes,
- 2. Click on Save.

		Custom Details fo	r: MUD001 - BPO: \	ersion 2.5.	0.0 - Example (Company v2	2.5.0.0					
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CON	TRA	Type of Retirement	Annuity									
Contractors	FID	ForeignIdentity		11223344								
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MED	BLT	Blood Type		B+								
MED	MEAD	Medical Aid										
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The deletion will be saved, and you will return to the *Employees* listing screen.

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