

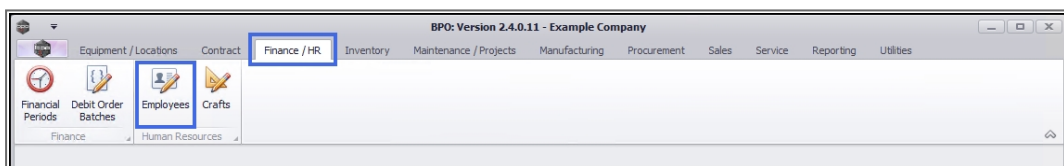
# HUMAN RESOURCES

## EMPLOYEES – BANKING DETAILS

**Banking Details** can be set up to add details that are not already set up on the system. For example, an employee may have a secondary savings account, into which any company reimbursements or bonuses will be paid.

Here you can view, Add, Edit and Delete any **additional** banking details set up on the employee (as well as the ones you can view in the **Edit Employee** screen)

**Ribbon Access:** *Finance and HR > Employees*

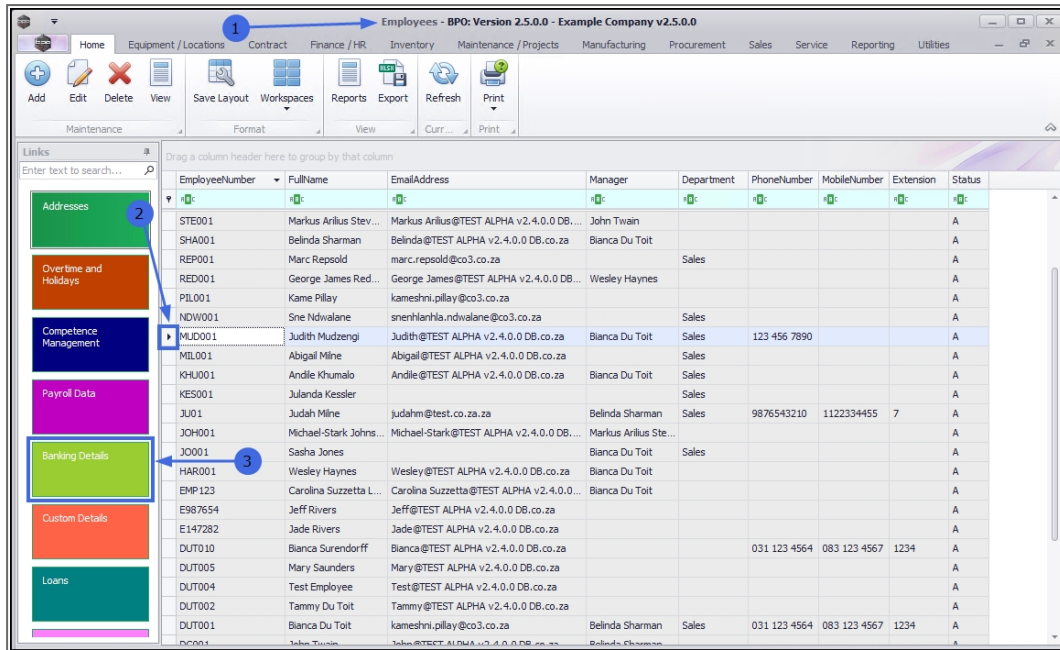


1. The **Employees** listing screen will open.

## VIEW EMPLOYEE BANKING DETAILS

### SELECT EMPLOYEE

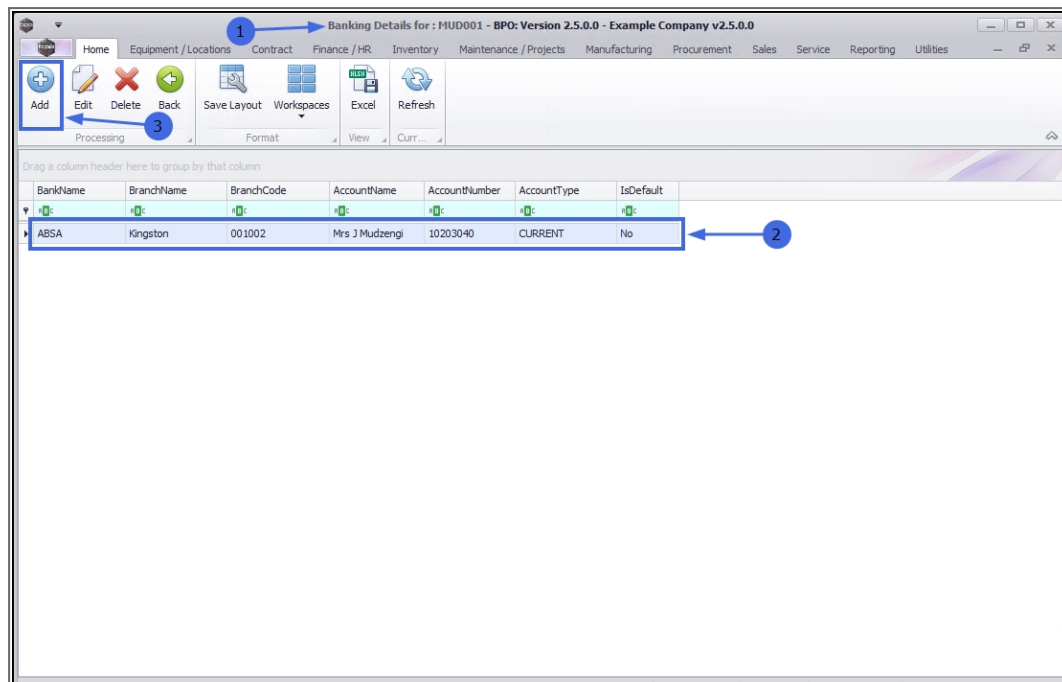
2. Select the **row** of the employee whose banking details you wish to **view**.
3. Click on the **Banking Details** tile.



1. The **Banking Details for: []** screen will open.
2. Here you can **view** the banking information set up on the system for the selected employee.

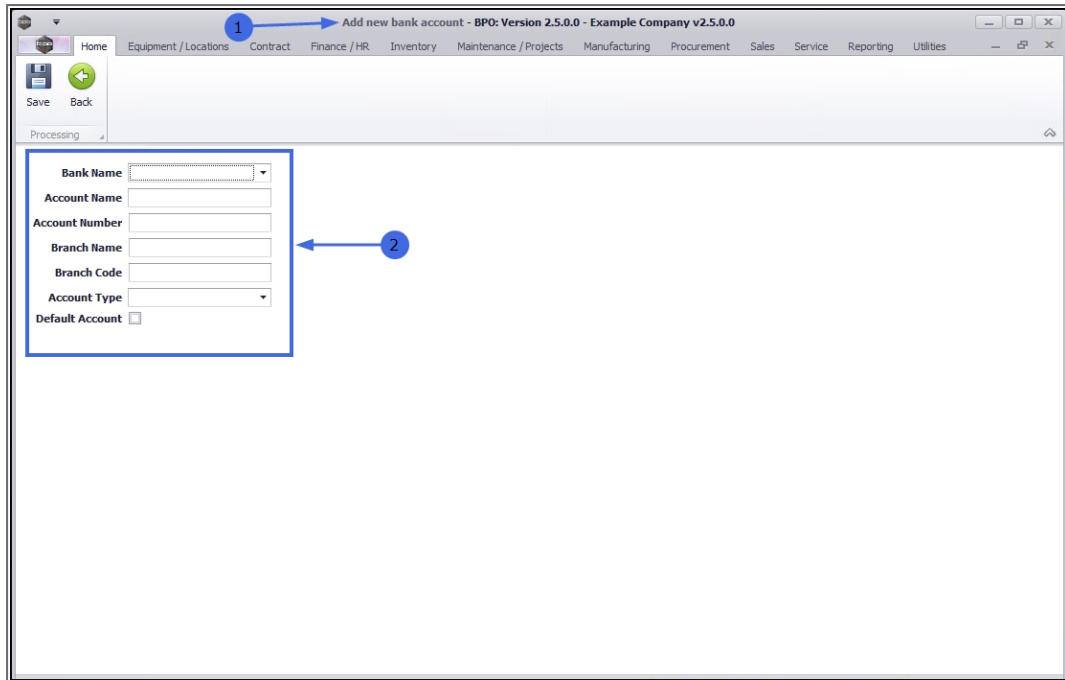
## ADD EMPLOYEE BANKING DETAILS

3. Click on **Add**.



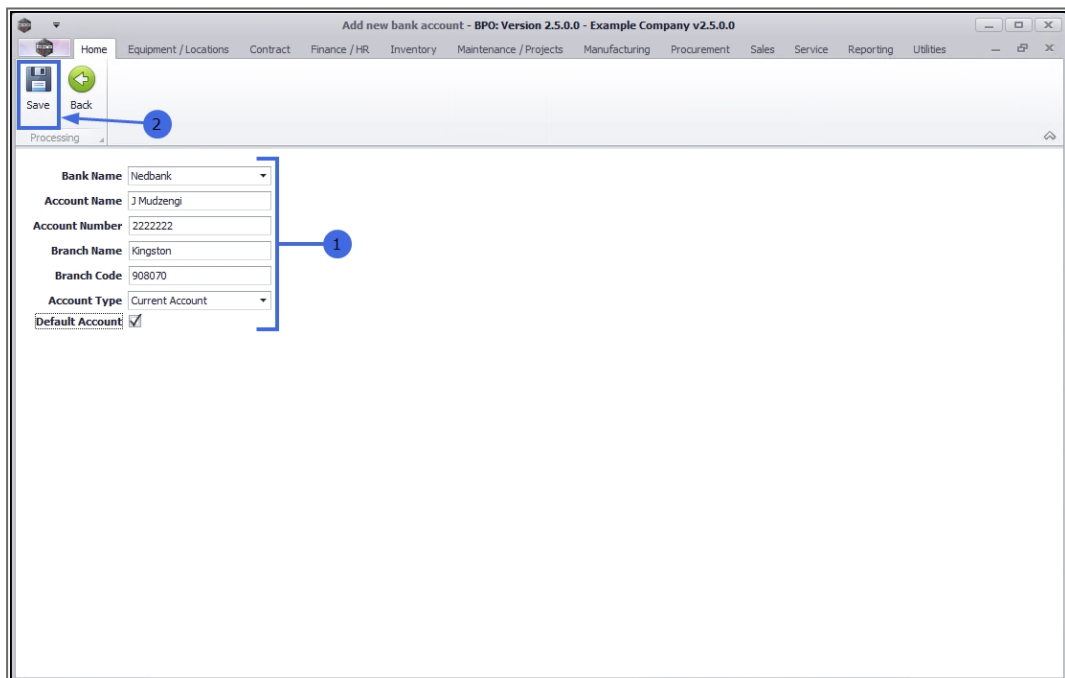
1. The **Add new bank account** screen will open.
2. Fill in the new banking details:
  - **Bank Name:** Click on the drop-down arrow and select from the list, the applicable bank name.
  - **Account Name:** Type in the name of the account holder.
  - **Account Number:** Type in the number that identifies this employee's individual account.
  - **Branch Name:** Type in the branch that this account is linked to.
  - **Branch Code:** Type in the unique identifier of this bank.
  - **Account Type:** Click on the drop-down arrow and select from the list the type of account e.g. Cheque, Savings, Current.
  - **Default Account:** Select this check box if this is the primary account that the employee wishes all payments to be made into.

**Note on Default Account:** This is important if the employee has more than one account set up on the system. For example, one account may be the default for regular salary payments and a second account may be for bonus or expense payments.

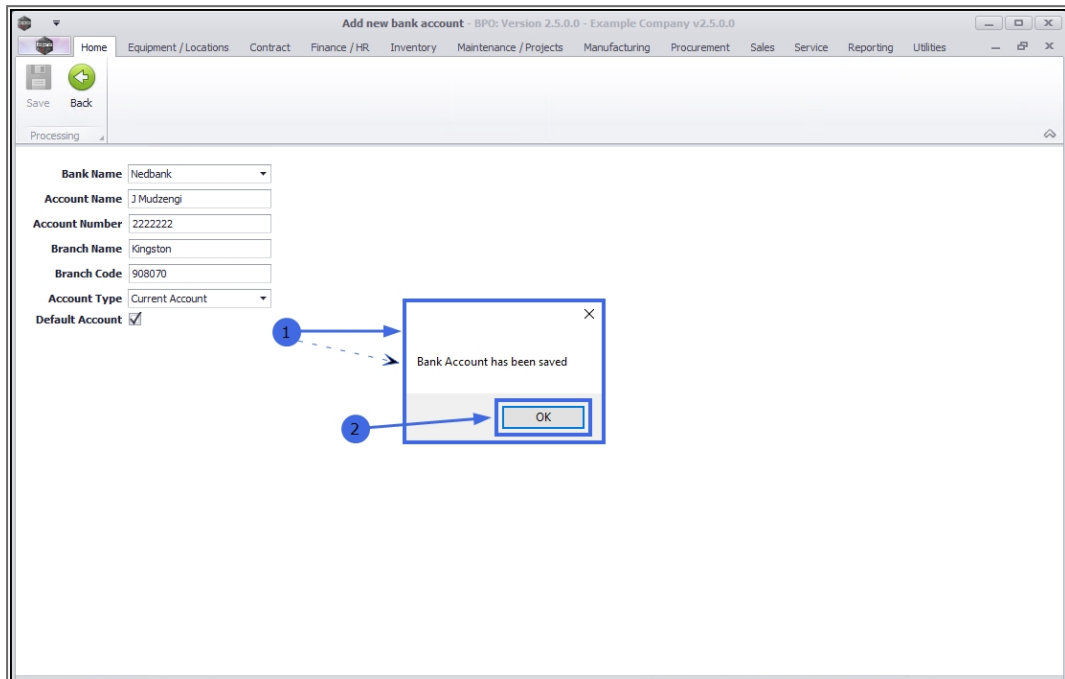


## SAVE ADDED DETAILS

1. When you have completed the banking details.
2. Click on **Save**.



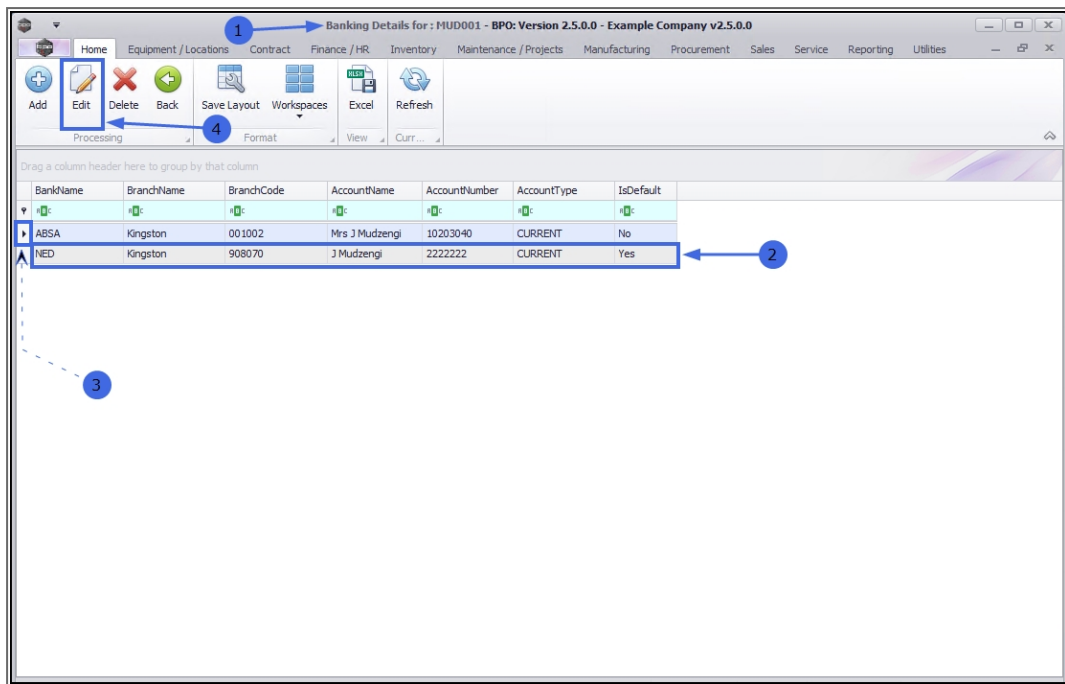
1. A message box will pop up advising the following:
  - *Bank Account has been saved.*
2. Click on **OK**.



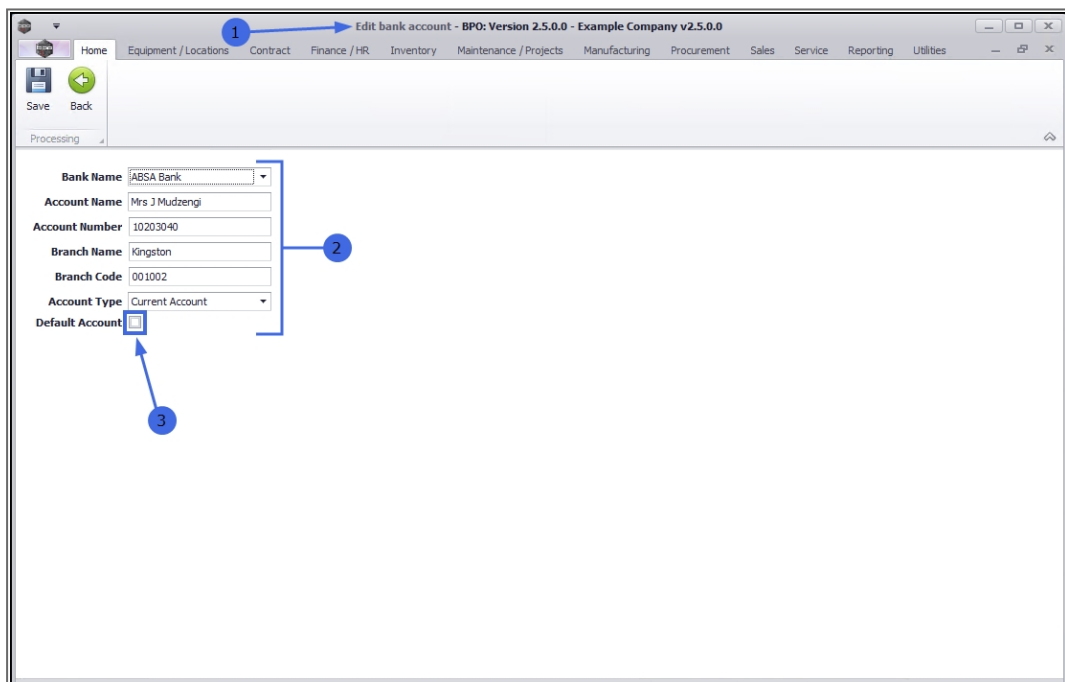
1. You will return to the **Banking Details for: []** screen.
2. The new banking information will be added to the data grid.

## EDIT EMPLOYEE BANKING DETAILS

3. Select the **row** of the banking details where you wish to *make changes*.
4. Click on **Edit**.

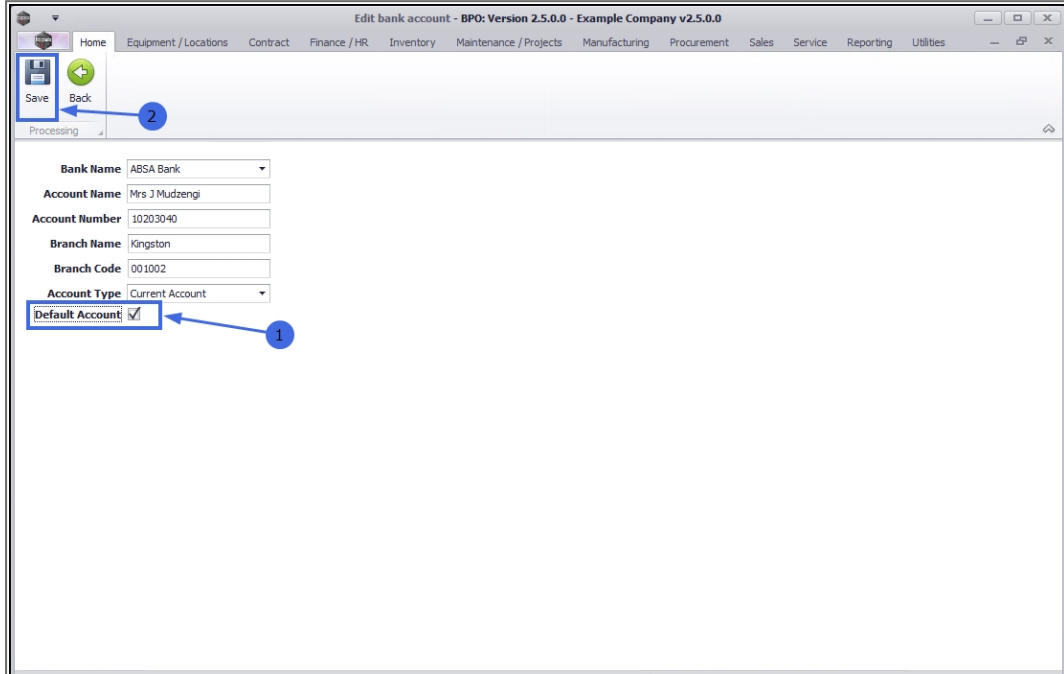


1. The **Edit bank account** screen will open.
2. Make the required changes to the details.
3. In this example, the **Default Account** check box is to be selected.



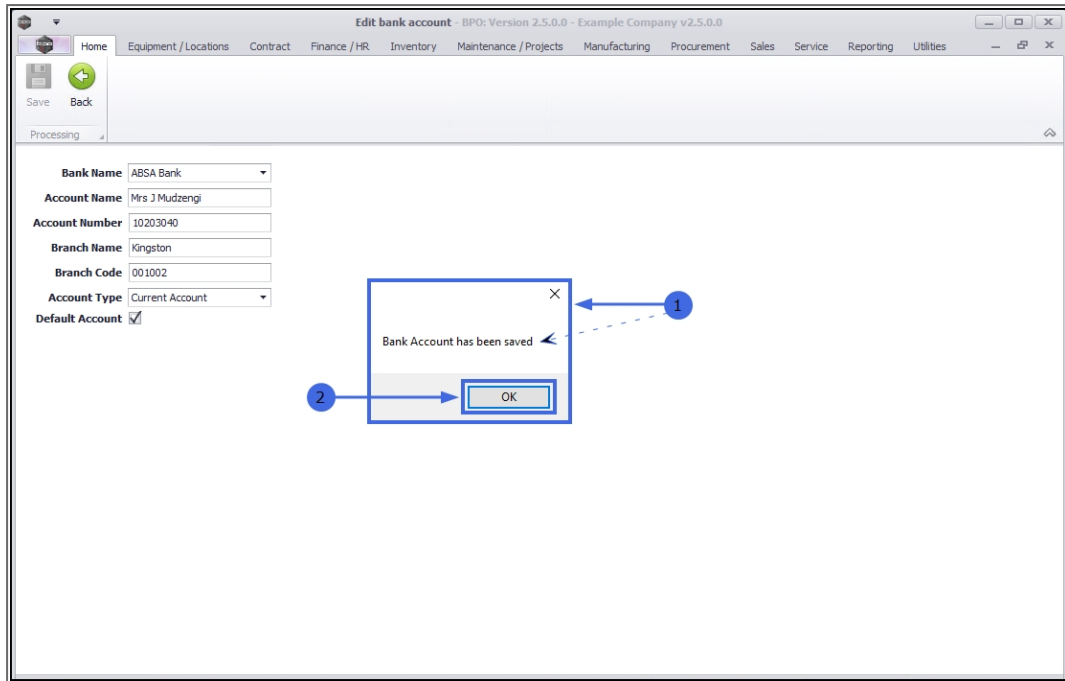
## SAVE EDITED DETAILS

1. When you have finished editing the required details,
2. Click on **Save**.



Editing bank account details for Mrs J Mudzengi at ABSA Bank, Kingston branch. The account type is Current Account. The 'Default Account' checkbox is checked.

1. A message box will pop up advising the following:
  - *Bank Account has been saved.*
2. Click on **OK**.



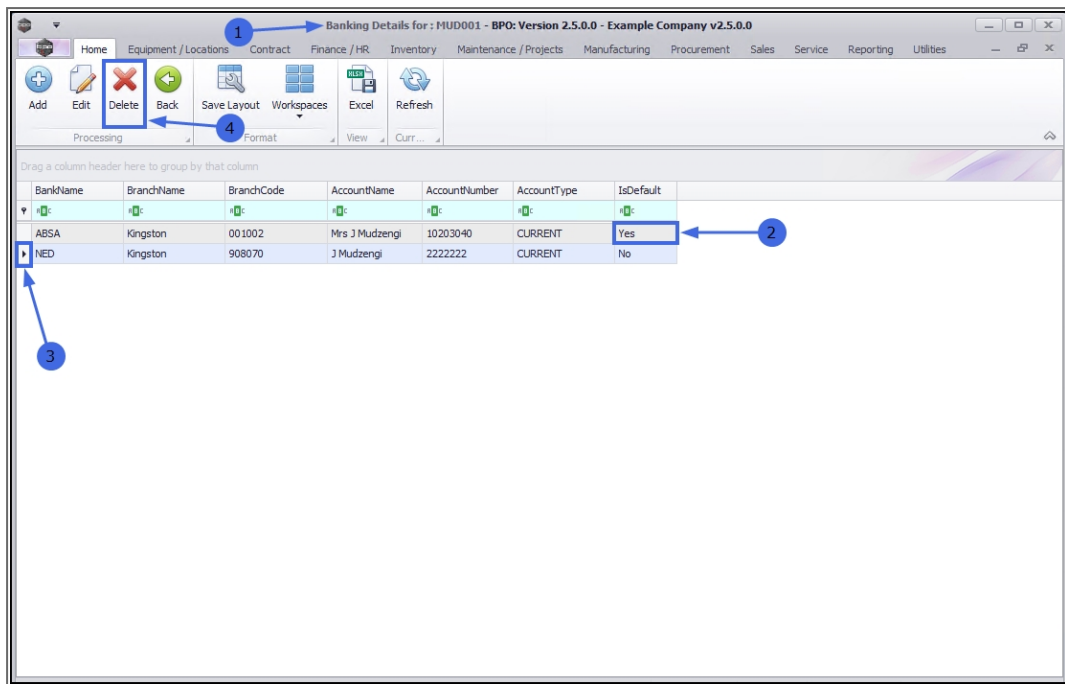
1. You will return to the **Banking Details for: []** screen.
2. The edited banking information can be viewed in the data grid.

**Note on Default Account Settings:** Selecting the bank account as default 'Yes', will set any other accounts in the data grid to 'No' as only one Default Account can be set up.

## DELETE EMPLOYEE BANKING DETAILS

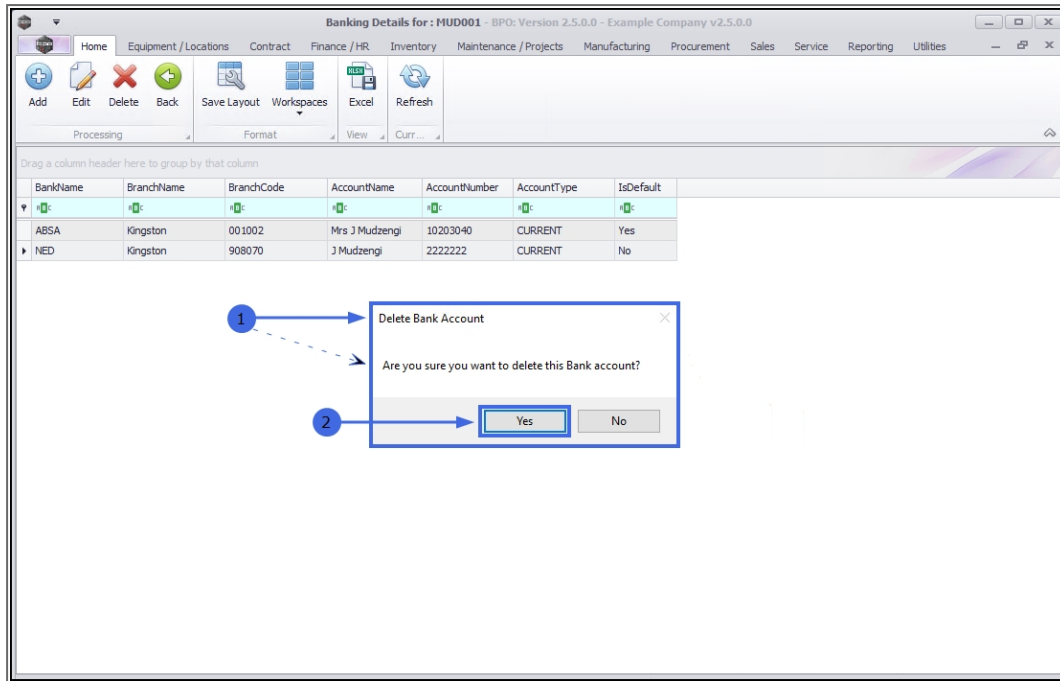
3. Select the **row** of the banking details that you wish to **remove**.
4. Click on **Delete**.



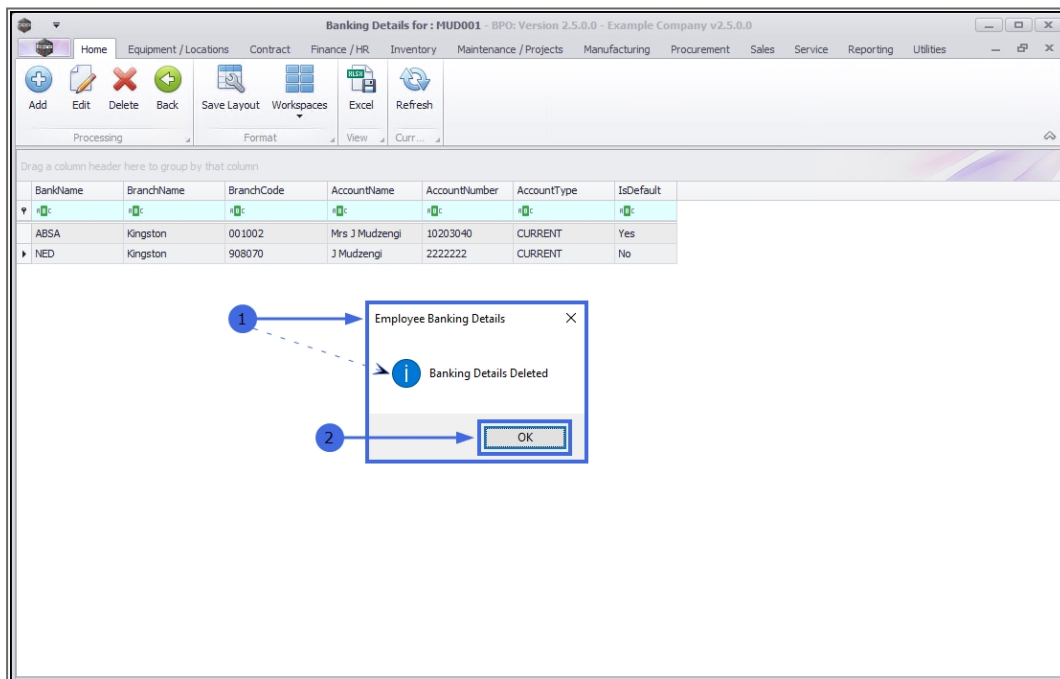


## SAVE DELETION

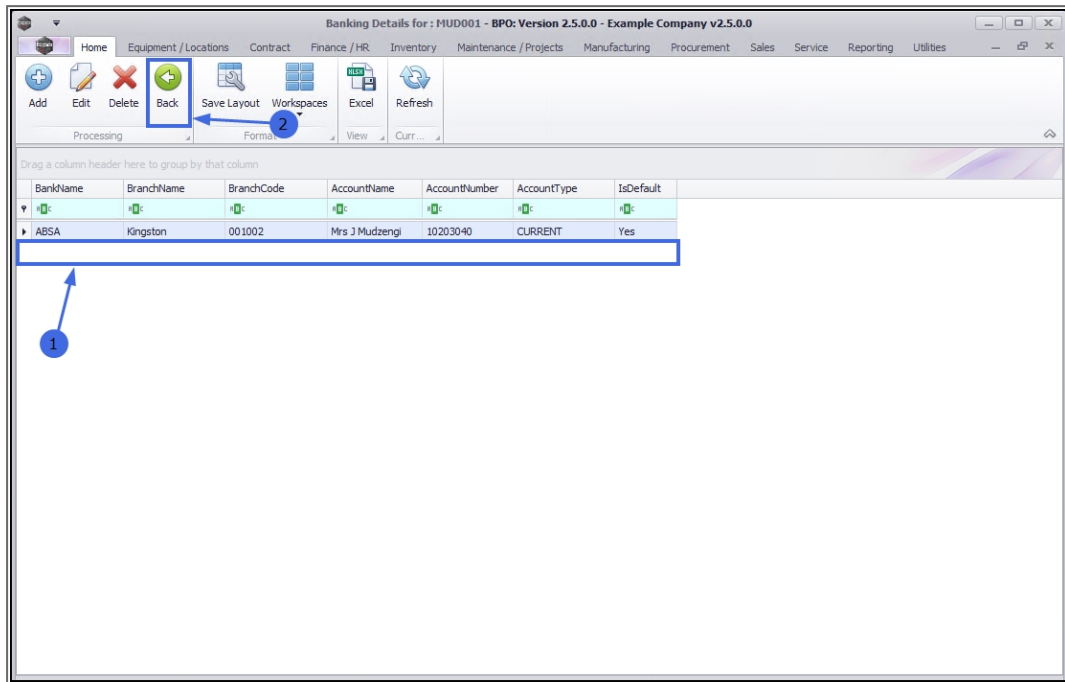
1. A **Delete Bank Account** message box will pop up with the following prompt:
  - *Are you sure you want to deleted this Bank account?*
2. Click on **Yes**.



1. An **Employee Banking Details** message box will pop up advising the following:
  - *Banking Details Deleted.*
2. Click on **OK**.



1. The selected banking details will be **removed** from the data grid.
2. Click on **Back** to return to the **Employees** listing screen.



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