

# HUMAN RESOURCES

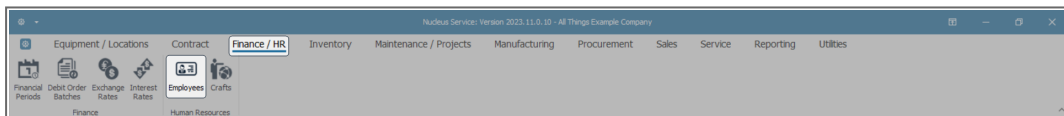
## EMPLOYEES – BANKING DETAILS

**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.

The **Banking Details** tile enables you to **view**, **add**, **edit**, **delete**, and manage all banking details associated with an employee.

The **Banking Details** tile can be accessed from the **Employees** listing screen and the [Edit Employee](#) screen.

### Ribbon Access: Finance / HR Employees

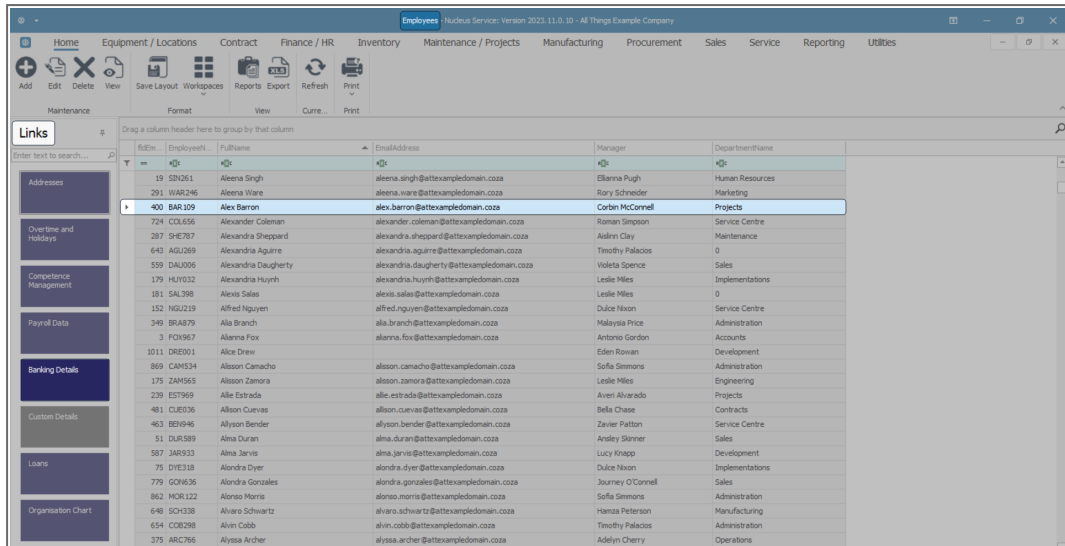


The **Employees** listing screen will display.

## VIEW EMPLOYEE BANKING DETAILS

### SELECT EMPLOYEE

- Select the **row** of the employee whose banking details you wish to **view**.
- Click on the **Banking Details** tile in the **Links** panel.



EmployeeID	EmployeeName	Fullname	EmailAddress	Manager	DepartmentName
19	SN1261	Aleena Singh	aleena.singh@attexampdomain.co.za	Elanna Pugh	Human Resources
291	WAR246	Aleena Witane	aleena.witane@attexampdomain.co.za	Rory Schneider	Marketing
400	BAR109	Alex Barron	alex.barron@attexampdomain.co.za	Corbin McConnell	Projects
724	COL656	Alexander Coleman	alexander.coleman@attexampdomain.co.za	Roman Simpson	Service Centre
267	SHE787	Alexandra Sheppard	alexandra.sheppard@attexampdomain.co.za	Aslenn Clay	Maintenance
643	AGU269	Alexandra Aguirre	alexandra.aguirre@attexampdomain.co.za	Timothy Palacios	0
559	DAU006	Alexandra Daugherty	alexandra.daugherty@attexampdomain.co.za	Valeria Sencoz	Sales
179	HUY032	Alexandra Huynh	alexandra.huynh@attexampdomain.co.za	Leslie Miles	Implementations
181	SAL398	Alexis Sales	alexis.sales@attexampdomain.co.za	Leslie Miles	0
152	NGU219	Alfred Nguyen	alfred.nguyen@attexampdomain.co.za	Dulce Nixon	Service Centre
349	BRA879	Alia Branch	alia.branch@attexampdomain.co.za	Malaysia Price	Administration
3	FOX967	Alanna Fox	alanna.fox@attexampdomain.co.za	Antonio Gordon	Accounts
1011	DRE001	Alice Drew	alice.drew@attexampdomain.co.za	Eden Rowan	Development
869	CAM534	Alison Camacho	alison.camacho@attexampdomain.co.za	Sofia Simmons	Administration
175	ZAM563	Alison Zamora	alison.zamora@attexampdomain.co.za	Leslie Miles	Engineering
239	EST969	Alicia Estrada	alicia.estrada@attexampdomain.co.za	Ariel Alvarado	Projects
481	CUE036	Alison Cuevas	alison.cuevas@attexampdomain.co.za	Bella Chase	Contracts
463	BEN046	Alyson Bender	alyson.bender@attexampdomain.co.za	Zavier Patton	Service Centre
51	DUR589	Alma Duran	alma.duran@attexampdomain.co.za	Andrey Skinner	Sales
587	JAR933	Alma Jarvis	alma.jarvis@attexampdomain.co.za	Lucy Knapp	Development
75	DYE318	Alondra Dyer	alondra.dyer@attexampdomain.co.za	Dulce Nixon	Implementations
779	GON636	Alondra Gonzales	alondra.gonzales@attexampdomain.co.za	Journey O'Connell	Sales
862	MOR122	Alonso Morris	alonso.morris@attexampdomain.co.za	Sofia Simmons	Administration
648	SCH338	Alvaro Schwartz	alvaro.schwartz@attexampdomain.co.za	Hanza Peterson	Manufacturing
654	COB298	Alvin Cobb	alvin.cobb@attexampdomain.co.za	Timothy Palacios	Administration
575	ARC786	Alissa Archer	alissa.archer@attexampdomain.co.za	Adelyn Cherry	Operations

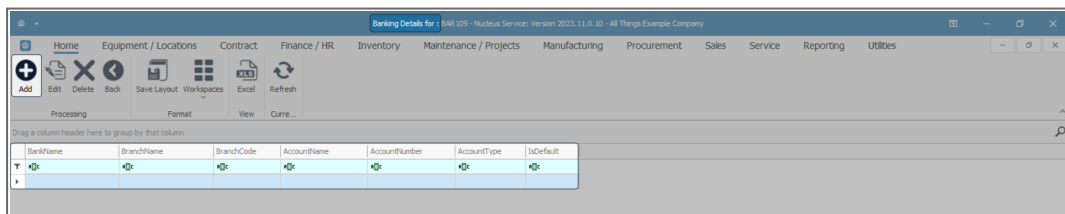
- The **Banking Details for : [ ]** screen will open.

## VIEW BANKING DETAILS

- Here you can view the banking information set up on the system for the selected employee.

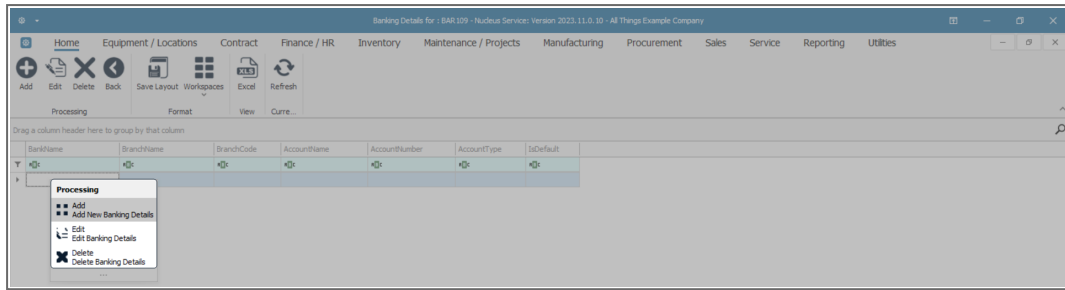
## ADD EMPLOYEE BANKING DETAILS

- Click on **Add**.



BranchName	BranchCode	AccountName	AccountNumber	AccountType	IsDefault

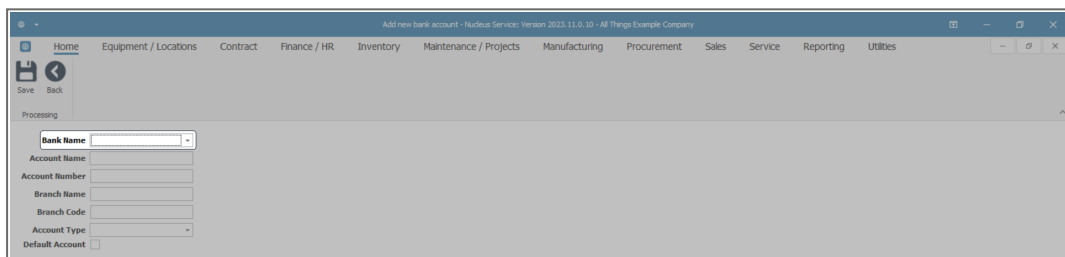
- Or **right-click** on any row in the list.
- A **Processing** menu will pop up.
- Click on **Add New Banking Details**.



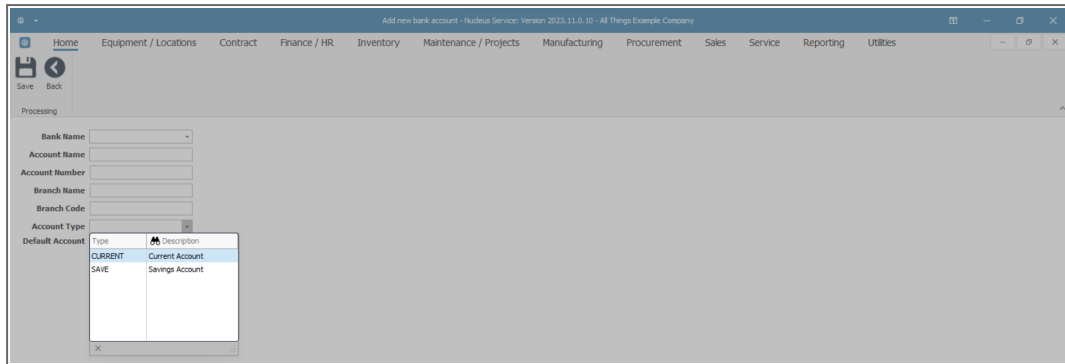
- The **Add new bank account** screen will open.

## ADD BANK ACCOUNT DETAILS

- **Bank Name:** Click on the **drop-down arrow** in this field 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. Current, Savings.



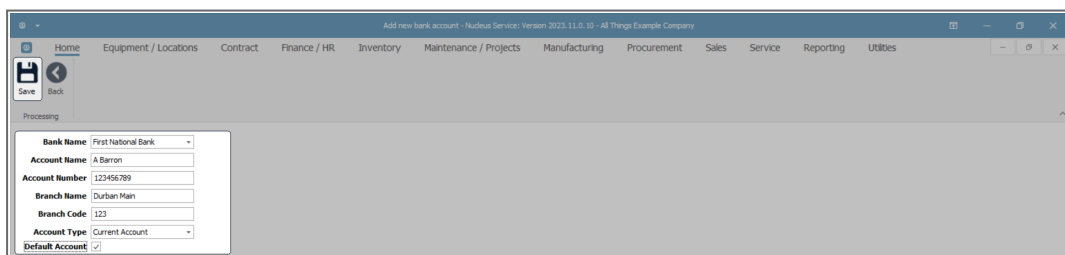
## DEFAULT ACCOUNT

- **Default Account:** Select this check box if this is to be the **primary** account that the employee wishes all payments to be made into.
  - In this example, this bank account has been selected as the default address.

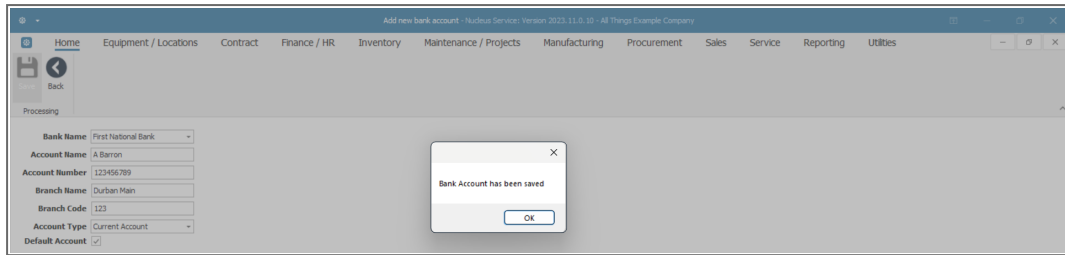
**Note on Default Account:** This is important if the employee has more than one account set up on the system. For example, one account may be the default for regular salary payments and a second account may be for bonus or expense payments.

## SAVE BANK DETAILS

- When you have completed the banking details, click on **Save**.

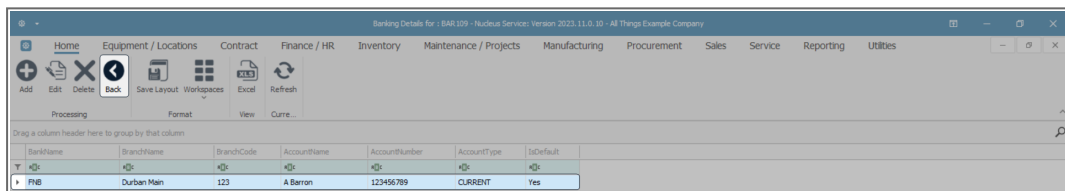


- A notification message box will pop up informing you -
  - **Bank account has been saved.**
- Click on **OK**.



## VIEW SAVED BANK ACCOUNT

- You will return to the **Banking Details for: [ ]** screen.
- The new bank details can now be viewed in the data grid.
- Note that the final column **IsDefault** reads as '**Yes**' as this bank account was selected as the **Default Account** in the previous step.
- Click on **Back** to return to the **Employees** listing screen.

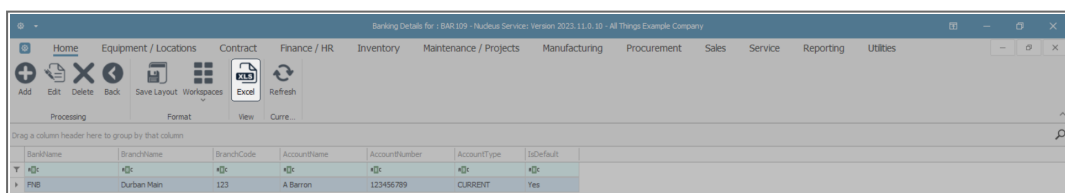


BankName	BranchName	BranchCode	AccountName	AccountNumber	AccountType	IsDefault
FNB	Durban Main	123	A Barron	123456789	CURRENT	Yes

- Or export data to Excel, if required.

## EXPORT TO EXCEL

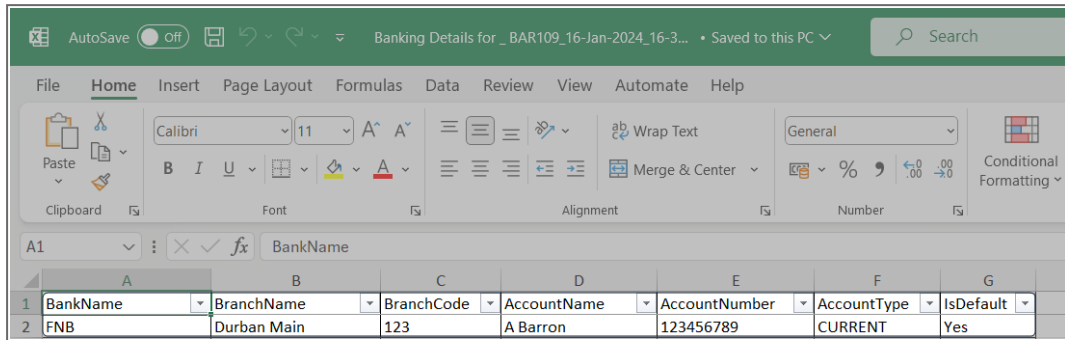
- In the **Banking Details for: [ ]** screen.
- Click on **Excel**.



BankName	BranchName	BranchCode	AccountName	AccountNumber	AccountType	IsDefault
FNB	Durban Main	123	A Barron	123456789	CURRENT	Yes

- This will open an MS Excel spreadsheet with all the data from the data grid.

- You can choose to save, view, search for data, prepare it for printing, and so on, as required.

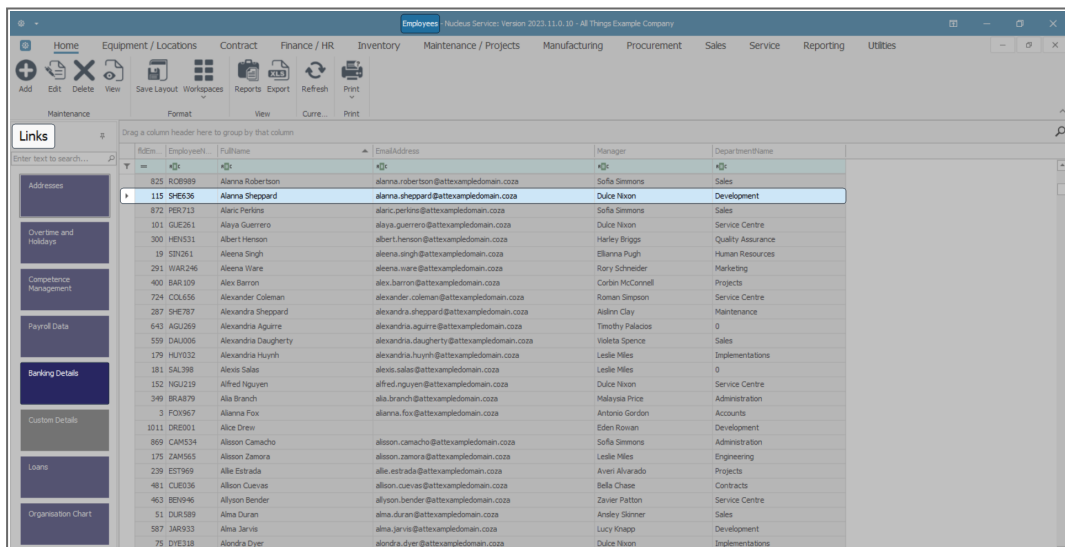


	BankName	BranchName	BranchCode	AccountName	AccountNumber	AccountType	IsDefault
1	FNB	Durban Main	123	A Barron	123456789	CURRENT	Yes

## EDIT EMPLOYEE BANKING DETAILS

### SELECT EMPLOYEE

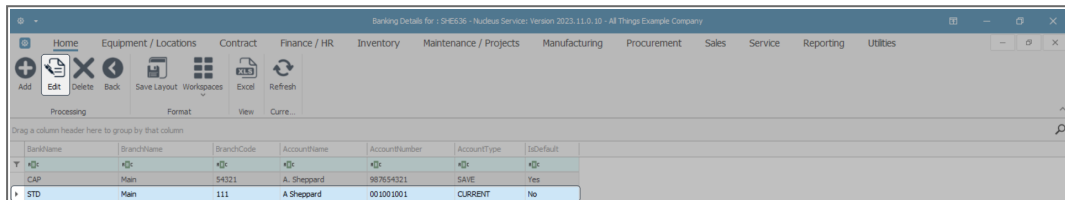
- In the **Employees** listing screen.
- Select the **row** of the employee for whom you wish to **edit** banking details.
- Click on the **Banking Details** tile in the **Links** panel.



ID	EmployeeID	Fullname	EmailAddress	Manager	DepartmentName
825	ROB989	Alanna Robertson	alanna.robertson@attexampldomain.co.za	Sofia Simmons	Sales
115	PH636	Alanna Sheppard	alanna.sheppard@attexampldomain.co.za	Dulce Nixon	Development
872	PER713	Alaric Perkins	alaric.perkins@attexampldomain.co.za	Sofia Simmons	Sales
101	GLE261	Alaya Guerrero	alaya.guerrero@attexampldomain.co.za	Dulce Nixon	Service Centre
300	HEN331	Albert Henson	albert.henson@attexampldomain.co.za	Harley Briggs	Quality Assurance
19	STN261	Aleena Singh	aleena.singh@attexampldomain.co.za	Elanna Pugh	Human Resources
291	WAR246	Aleena Ware	aleena.ware@attexampldomain.co.za	Rory Schneider	Marketing
400	RAA109	Alex Barron	alex.barron@attexampldomain.co.za	Corben McConnell	Projects
724	COL656	Alexander Coleman	alexander.coleman@attexampldomain.co.za	Raman Simpson	Service Centre
287	PH6767	Alexandra Sheppard	alexandra.sheppard@attexampldomain.co.za	Ashlyn Clay	Maintenance
643	AGU269	Alexandria Aguirre	alexandria.aguirre@attexampldomain.co.za	Timothy Palacios	0
559	DAU006	Alexandria Daugherty	alexandria.daugherty@attexampldomain.co.za	Violeta Spence	Sales
179	HUY032	Alexandria Huynh	alexandria.huynh@attexampldomain.co.za	Leslie Miles	Implementations
181	SAL398	Alexis Salas	alexis.salas@attexampldomain.co.za	Leslie Miles	0
152	NGU219	Alfred Nguyen	alfred.nguyen@attexampldomain.co.za	Dulce Nixon	Service Centre
349	BRAB79	Alia Branch	alia.branch@attexampldomain.co.za	Malaysia Price	Administration
3	FOX967	Alanna Fox	alanna.fox@attexampldomain.co.za	Antonio Gordon	Accounts
1011	DRE001	Alice Drew	alice.drew@attexampldomain.co.za	Eden Rowan	Development
869	CAM634	Alison Camacho	alison.camacho@attexampldomain.co.za	Sofia Simmons	Administration
175	ZAM965	Alison Zamora	alison.zamora@attexampldomain.co.za	Leslie Miles	Engineering
239	EST969	Alle Estrada	alle.estrada@attexampldomain.co.za	Averi Alvarado	Projects
481	CUE036	Allison Cuevas	allison.cuevas@attexampldomain.co.za	Bella Chase	Contracts
463	BEN046	Allyson Bender	allyson.bender@attexampldomain.co.za	Zavier Patton	Service Centre
51	DUR589	Alma Duran	alma.duran@attexampldomain.co.za	Ansley Skinner	Sales
587	JAR933	Alma Jarvis	alma.jarvis@attexampldomain.co.za	Lucy Khapp	Development
75	DYE138	Alondra Dyer	alondra.dyer@attexampldomain.co.za	Dulce Nixon	Implementations

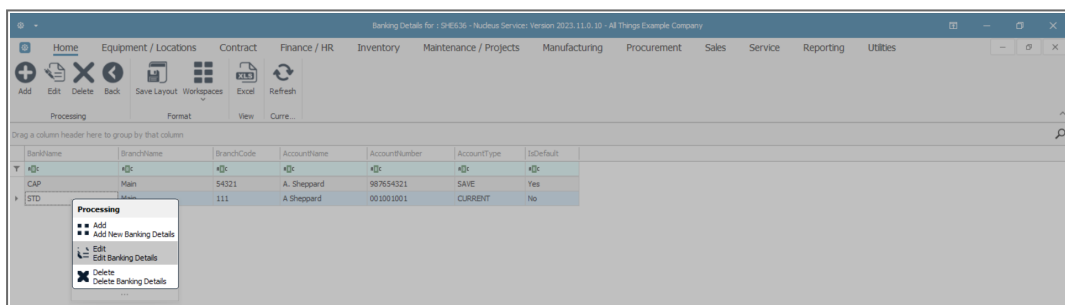
## SELECT BANKING DETAILS TO EDIT

- The **Banking Details for : [ ]** screen will open.
- Select the **row** of the banking details where you wish to make **changes**.
- Click on **Edit**.



BankName	BranchName	BranchCode	AccountName	AccountNumber	AccountType	IsDefault
CAP	Main	54321	A. Sheppard	987654321	SAVE	Yes
STD	Main	111	A. Sheppard	001001001	CURRENT	No

- Or **right-click** on the row of the banking details where you wish to make **changes**.
- A **Processing** menu will pop up.
- Click on **Edit Banking Details**.



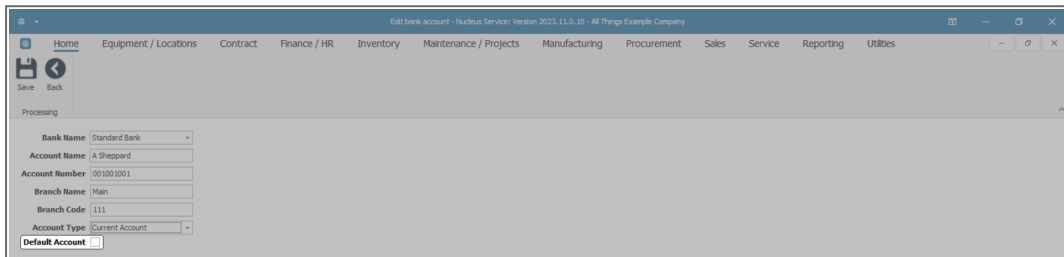
BankName	BranchName	BranchCode	AccountName	AccountNumber	AccountType	IsDefault
CAP	Main	54321	A. Sheppard	987654321	SAVE	Yes
STD	Main	111	A. Sheppard	001001001	CURRENT	No

- The **Edit bank account** screen will open.

## EDIT BANKING DETAILS

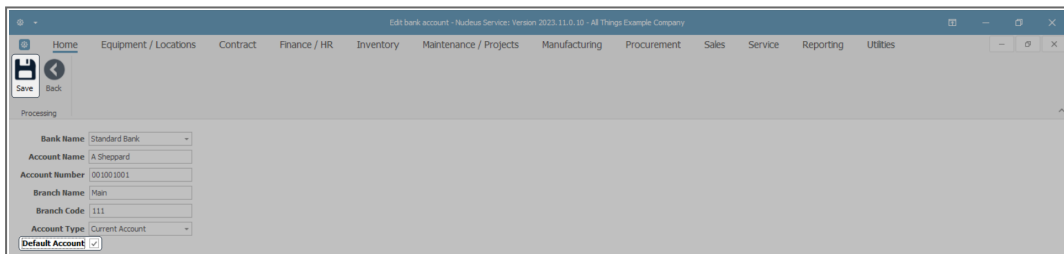
- All of the fields, except **Bank Name** and **Account Type** and the **Default Account** check box, require the edited details to be typed directly into the text boxes.

- If you wish to edit the **Bank Name** and **Account Type**, click on the **drop-down arrow** and select an alternative from the list displayed.
- In this example, the banking detail is to be edited to become the primary or default bank account, therefore the **Default Account** check box is to be selected.

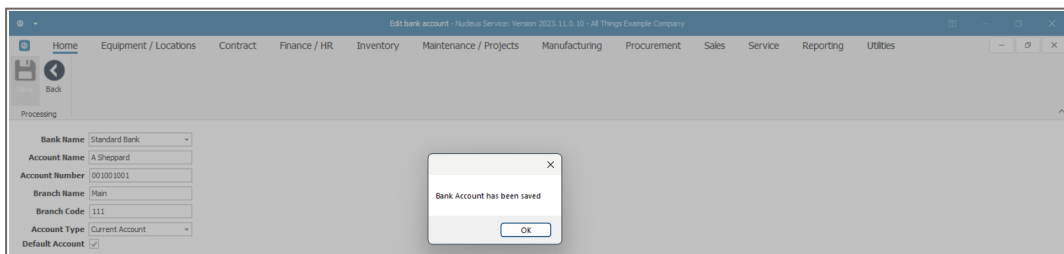


## SAVE EDITED DETAILS

- When you have finished editing the banking details -
- Click on **Save**.



- A notification message box will pop up informing you -
  - **Bank Account has been saved.**
- Click on **OK**.





## VIEW EDITED BANK ACCOUNT

- You will return to the **Banking Details for: [ ]** screen where the edited banking information can be viewed in the data grid.
- Click on **Back** to return to the **Employees** listing screen.

BankName	BranchCode	AccountName	AccountNumber	AccountType	IsDefault
CAP Main	54321	A. Sheppard	987654321	SAVE	No
STD Main	111	A Sheppard	001001001	CURRENT	Yes

## DELETE EMPLOYEE BANKING DETAILS

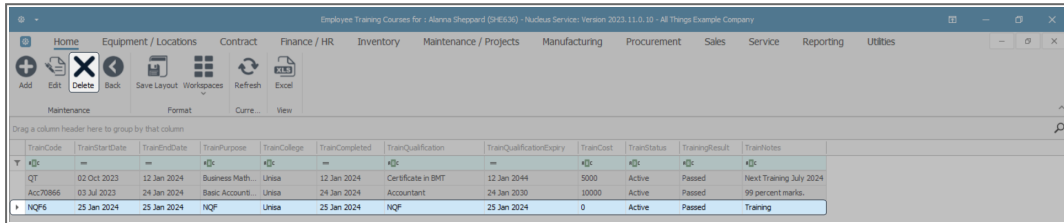
### SELECT EMPLOYEE

- In the **Employees** listing screen -
- Select the **row** of the employee for whom you wish to **delete** banking details.
- Click on the **Banking Details** tile in the **Links** panel.

EmployeeID	Fullname	EmailAddress	Manager	DepartmentName
825	Alanna Robertson	alanna.robertson@tattexampdomain.co.za	Sofia Semmons	Sales
115	<b>Alanna Sheppard</b>	<b>alanna.sheppard@tattexampdomain.co.za</b>	Dulce Nixon	Development
872	Alana Perkins	alana.perkins@tattexampdomain.co.za	Sofia Semmons	Sales
101	Alaya Guerrero	alaya.guerrero@tattexampdomain.co.za	Dulce Nixon	Service Centre
300	Albert Henson	albert.henson@tattexampdomain.co.za	Harley Briggs	Quality Assurance
19	Aleena Singh	aleena.singh@tattexampdomain.co.za	Elanna Pugh	Human Resources
291	Aleena Ware	aleena.ware@tattexampdomain.co.za	Rory Schneider	Marketing
400	Alex Barron	alex.barron@tattexampdomain.co.za	Corbin McConnell	Projects
724	Alexander Coleman	alexander.coleman@tattexampdomain.co.za	Roman Simpson	Service Centre
287	Alexandra Sheppard	alexandra.sheppard@tattexampdomain.co.za	Ashlin Clay	Maintenance
640	Alexandra Aguirre	alexandra.aguirre@tattexampdomain.co.za	Timothy Palacios	IT
559	Alexandra Daugherty	alexandra.daugherty@tattexampdomain.co.za	Valeria Gonzalez	Sales
179	Alexandra Huynh	alexandra.huynh@tattexampdomain.co.za	Leslie Miles	Implementations
181	Alexis Salas	alexis.salas@tattexampdomain.co.za	Leslie Miles	IT
152	Alfred Nguyen	alfred.nguyen@tattexampdomain.co.za	Dulce Nixon	Service Centre
349	Alia Branch	alia.branch@tattexampdomain.co.za	Malaysia Price	Administration
3	Alanna Fox	alanna.fox@tattexampdomain.co.za	Antonio Gordon	Accounts
1011	Alice Drew	alice.drew@tattexampdomain.co.za	Eden Rowan	Development
869	Alison Camacho	alison.camacho@tattexampdomain.co.za	Sofia Semmons	Administration
175	Alison Zamora	alison.zamora@tattexampdomain.co.za	Leslie Miles	Engineering
239	Alex Estrada	alex.estrada@tattexampdomain.co.za	Ariel Alvarado	Projects
481	Alison Cuevas	alison.cuevas@tattexampdomain.co.za	Bella Chase	Contracts
463	Alyson Bender	alyson.bender@tattexampdomain.co.za	Zavier Patton	Service Centre
51	Alma Duran	alma.duran@tattexampdomain.co.za	Ansley Skinner	Sales
587	Alma Jarvis	alma.jarvis@tattexampdomain.co.za	Lucy Knappe	Development
75	Alondra Dyer	alondra.dyer@tattexampdomain.co.za	Dulce Nixon	Implementations

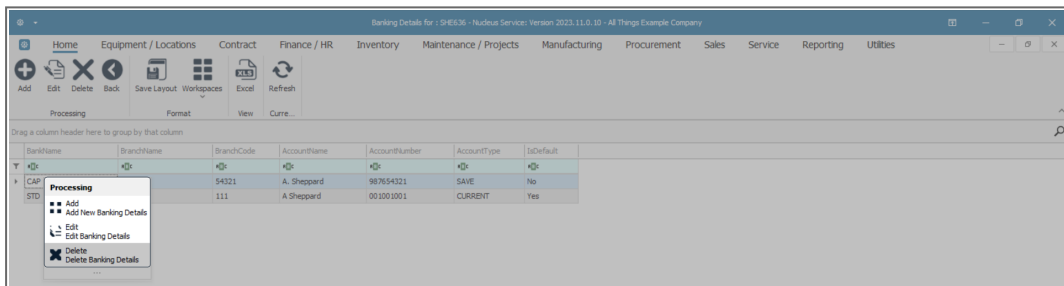
## SELECT BANKING DETAILS TO DELETE

- The **Employee Training Courses for : [ ]** screen will open.
- Select the **row** that you wish to **delete**.
- Click on **Delete**.



TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainingResult	TrainNotes
QT	02 Oct 2023	12 Jan 2024	Business Math...	Unisa	12 Jan 2024	Certificate in BMT	12 Jan 2044	5000	Active	Passed	Next Training July 2024
Acc70966	03 Jul 2023	24 Jan 2024	Basic Account...	Unisa	24 Jan 2024	Accountant	24 Jan 2030	10000	Active	Passed	99 percent marks.
NQF6	25 Jan 2024	25 Jan 2024	NQF6	Unisa	25 Jan 2024	NQF6	25 Jan 2024	0	Active	Passed	Training

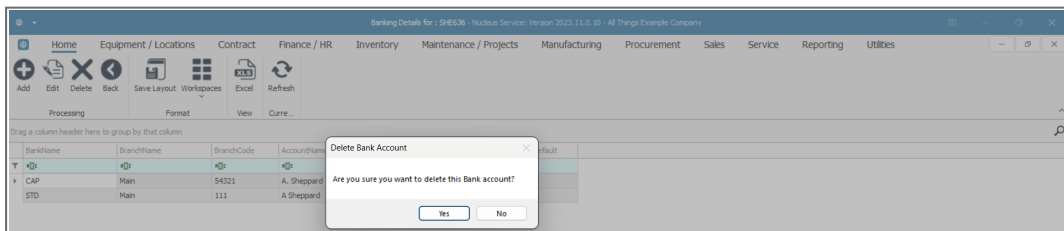
- Or **right-click** on the **row** that you wish to **delete**.
- A **Process** menu will pop up.
- Click on **Delete Training Course**.



BankName	BranchName	BranchCode	AccountName	AccountNumber	AccountType	IsDefault
CAP		54321	A. Sheppard	987654321	SAVE	No
STD		111	A. Sheppard	001001001	CURRENT	Yes

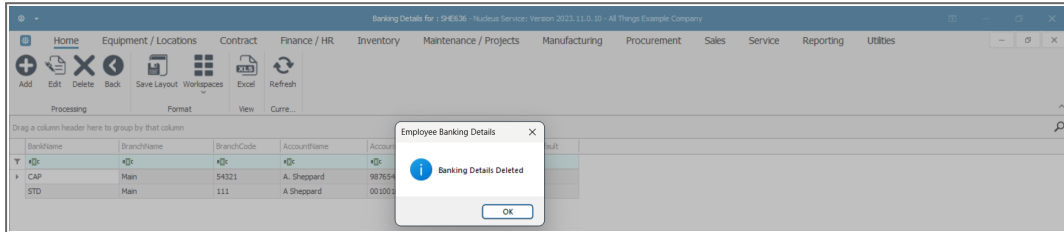
## CONFIRM DELETION

- A **Delete Bank Account** message box will pop up asking -
  - **Are you sure you want to delete this Bank account?**
- Click on **Yes**.



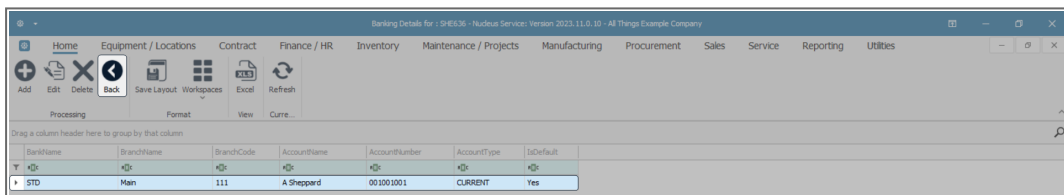
BankName	BranchName	BranchCode	AccountName	AccountNumber	AccountType	IsDefault
CAP	Main	54321	A. Sheppard	987654321	SAVE	No
STD	Main	111	A. Sheppard	001001001	CURRENT	Yes

- An **Employee Banking Details** message box will pop up informing you -
  - **Banking Details Deleted.**
- Click on **OK**.



## VIEW DELETION RESULTS

- You will return to the **Banking Details for: [ ]** screen where the selected banking details have been removed from the data grid.
- Click on **Back** to return to the **Employees** listing screen.



MNU.021.016

