

HUMAN RESOURCES

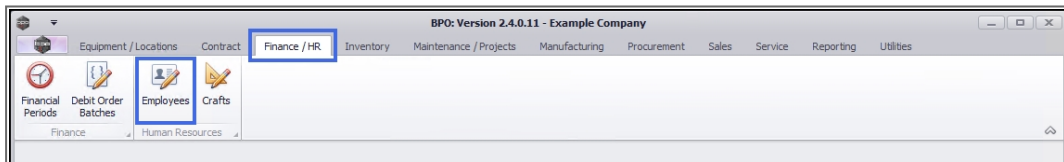
EMPLOYEES – ADD AN EMPLOYEE

Each employee within the company is loaded onto the system as an **Employee**, with his/her details.

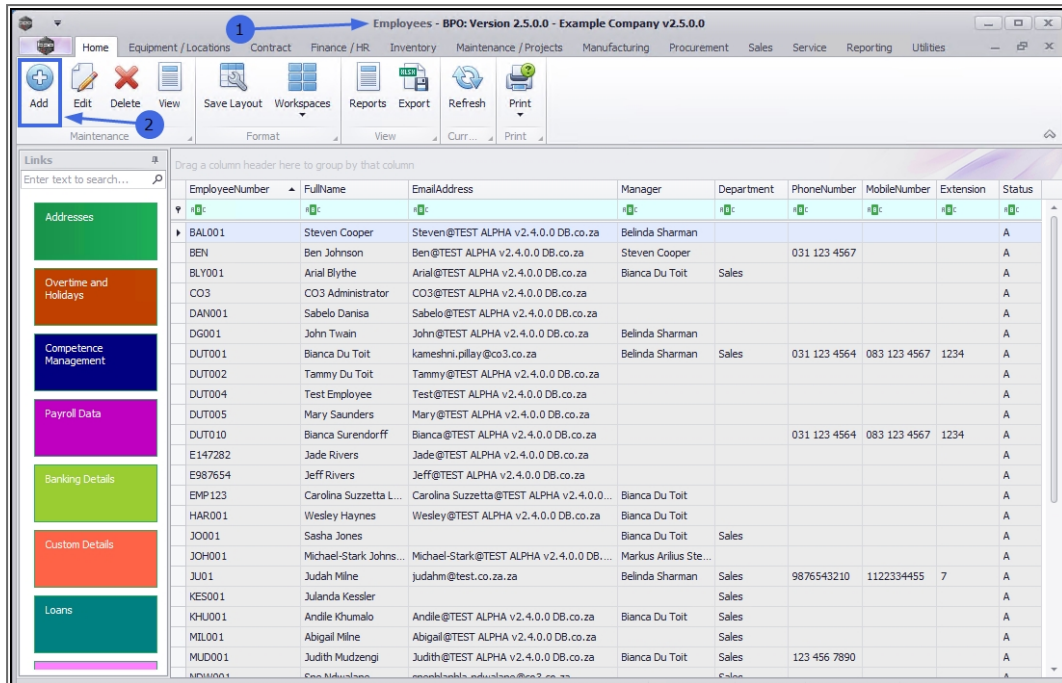
These details would relate to what the company needs to know about its employees, but can include the following: Personal Details, e.g. Phone Number and Email Address, Banking Details, Licenses and Training Details, Craft Details (skill or job title).

By loading your employees correctly, you will be able to keep track of employee shifts and manage your human resources more efficiently.

Ribbon Access: *Finance and HR > Employees*



1. The **Employees** listing screen will be displayed.
2. Click on **Add**.



1. The **Add new Employee** screen will open.

ADD EMPLOYEE DETAILS

2. Type the new employee details in the self-explanatory fields.

- **Note:** Ensure that all the mandatory [*] fields are filled in or the employee details will not save.

Explanations are provided for the following fields:

3. **Employee Number:** This is the unique code given by the company to keep track of this employee. The standard convention is to use the first 3 letters of the employee's surname, followed by 3 digits. e.g. **ROW001** for David Rowe. The digits will increase as employees with the same 3 letters in their surname are added to the company.

4. The following fields are very important:

MANAGER

- Click on the search button and [select the person who manages this employee](#). This is important for [BPO CRM](#) - as the manager will be able to see his teams sales progress.

DEPARTMENT

- Click on the search button and [select the Department](#) to which this employee is linked. It is important to select the correct department, especially where the department is used for posting financial transactions.

USER ID

- Click on the search button and [select the User ID](#). This is utilised when the employee is also going to be a user and will need to log in to BPO and use the system.

When you have added the employee's personal and banking details, move to the right of the screen to the additional information docking panels.

[Click on the links to direct you to instructions on how to add information to these panels.](#)

ADD A DEPENDANT

1. If this employee has any dependants (any persons, child or adult, who rely on the employee for financial support) then the dependant details can be **added**, **edited** and **deleted** here.

ADD A SHIFT

2. If this employee is to be linked to a shifts (or work schedule) then the relevant details can be **added**, **edited** and **deleted** here.

ADD A CRAFT

3. Every employee must be linked to at least one craft to be able to save the new employee details. More than one craft can be linked. You can **add**, **edit** and **delete** crafts here.

The screenshot displays the 'Add new Employee' form in the BPO software. The form is divided into several sections:

- Employee Details:** Includes fields for Employee Number (ROW001), First Name (David), Second Name (Christopher), Initials (DC), Last Name (Rowe), ID Number (111111), Birth Date (28/06/1980), Phone Number (W) (222222), Extension (W) (2), Phone Number (H) (333333), Fax Number (444444), Mobile Number (555555), Email Address (davidr@testemail.co.za), Passport Number (666666), Marital Status (Married), Manager (Belinda Sharman), Department (Sales Department), User ID (DavidR), Bank Name (ABSA Bank), Account Name (Mr DC Rowe), Account Number (777777), and Default Account (checked).
- Physical Address:** Includes fields for Address (1 New House), City (New Town), Province (New Province), Postal Code (NEW101), and Country (SA).
- Postal Address:** Includes fields for Address (PO Box 101), City (New Town), Province (New Province), Postal Code (NEW102), and Country (SA).
- Branch Information:** Includes fields for Branch Name (New Town), Branch Code (88888), and Account Type (Current Account).
- Dependants Table:** A table with columns: FirstName, MiddleName, LastName, IDNumber, BirthDate, Relation, and IsDependant. It contains one empty row.
- Shifts Table:** A table with columns: StartDate, ShiftName, StartDay, and StartDateKey. It contains one empty row.
- Crafts Table:** A table with columns: CraftName, CraftDesc, SiteDescription, AccountCode, COSAccCode, CostEstimate, Rate, and IsPri. It contains one empty row.

Blue arrows and numbers 1, 2, and 3 point to the 'Physical Address', 'Postal Address', and 'Crafts' sections respectively.

SAVE NEW EMPLOYEE

1. When you have finished adding the new employee details,
2. Click on **Save**.

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

VIEW NEW EMPLOYEE

1. You will return to the **Employees** listing screen.
2. The new employee can now be viewed in the data grid.

EmployeeNumber	FullName	EmailAddress	Manager	Department	PhoneNumber	MobileNumber	Extension	Status
SHA001	Belinda Sharman	Belinda@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A
BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567			A
DUT001	Bianca Du Toit	kameshni.pillay@co3.co.za	Belinda Sharman	Sales	031 123 4564	083 123 4567	1234	A
DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	A
EMP123	Carolina Suzzetta L...	Carolina Suzzetta@TEST ALPHA v2.4.0.0...	Bianca Du Toit					A
CO3	CO3 Administrator	CO3@TEST ALPHA v2.4.0.0 DB.co.za						A
ROW001	David Rowe	david@testemail.co.za	Belinda Sharman	Sales	222222	555555	2	A
RED001	George James Red...	George James@TEST ALPHA v2.4.0.0 DB...	Wesley Haynes					A
E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						A
E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						A
DG001	John Twain	John@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A
TIM	Joseph Timber	Joseph@TEST ALPHA v2.4.0.0 DB.co.za						A
JU01	Judah Milne	judahm@test.co.za	Belinda Sharman	Sales	9876543210	1122334455	7	A
MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			A
KES001	Julanda Kessler			Sales				A
PL001	Kame Pillay	kameshni.pillay@co3.co.za						A
You001	Karlien Jessica You...	Karlien Jessica@TEST ALPHA v2.4.0.0 DB...						A
REP001	Marc Repsold	marc.repsold@co3.co.za		Sales				A
STE001	Markus Arilius Stev...	Markus Arilius@TEST ALPHA v2.4.0.0 DB...	John Twain					A
DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						A
TH001	Mary Thompson	Mary@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A
JOH001	Michael-Stark Johns...	Michael-Stark@TEST ALPHA v2.4.0.0 DB...	Markus Arilius Ste...					A
DAM001	Sabela Davies	Sabela@TEST ALPHA v2.4.0.0 DB.co.za						A

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