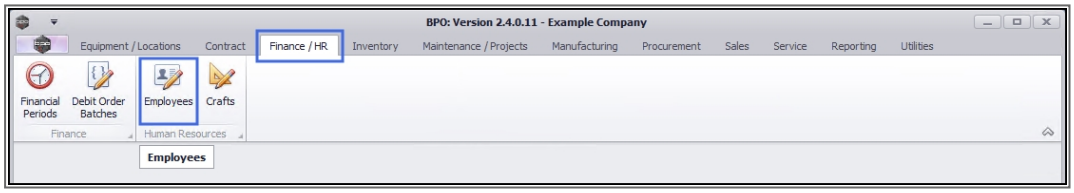
HUMAN RESOURCES

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 only 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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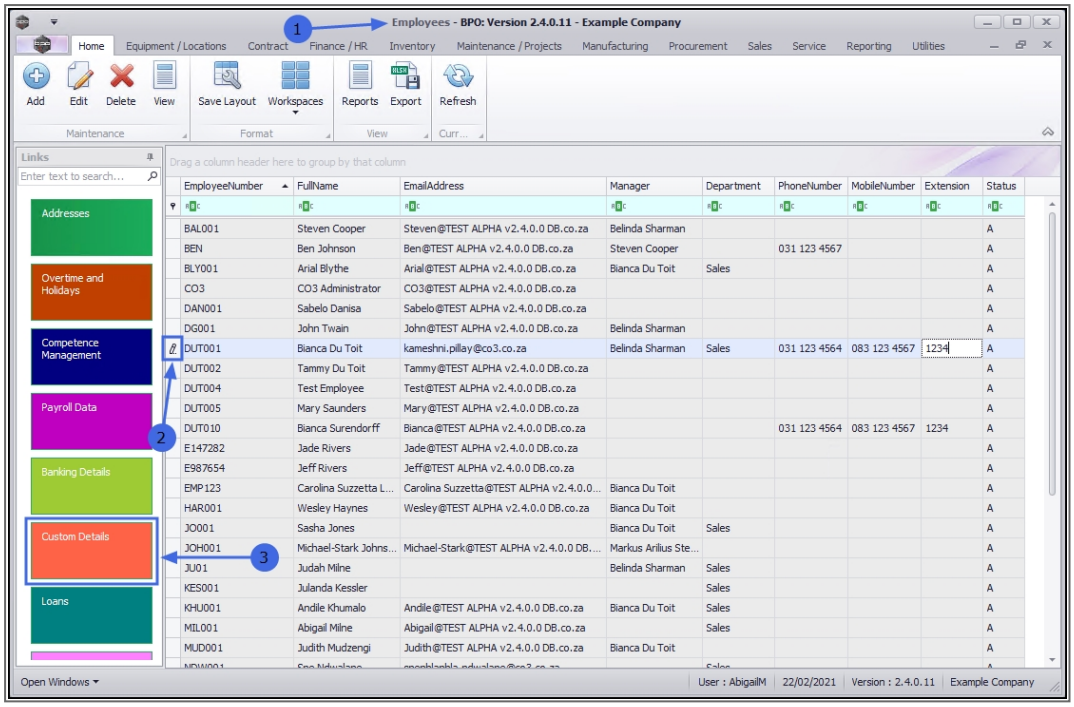

1. The ***Custom Details for: []*** screen will be displayed.
2. Pre-defined codes will be listed in this screen.

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

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 only add information to the Detail Data column.

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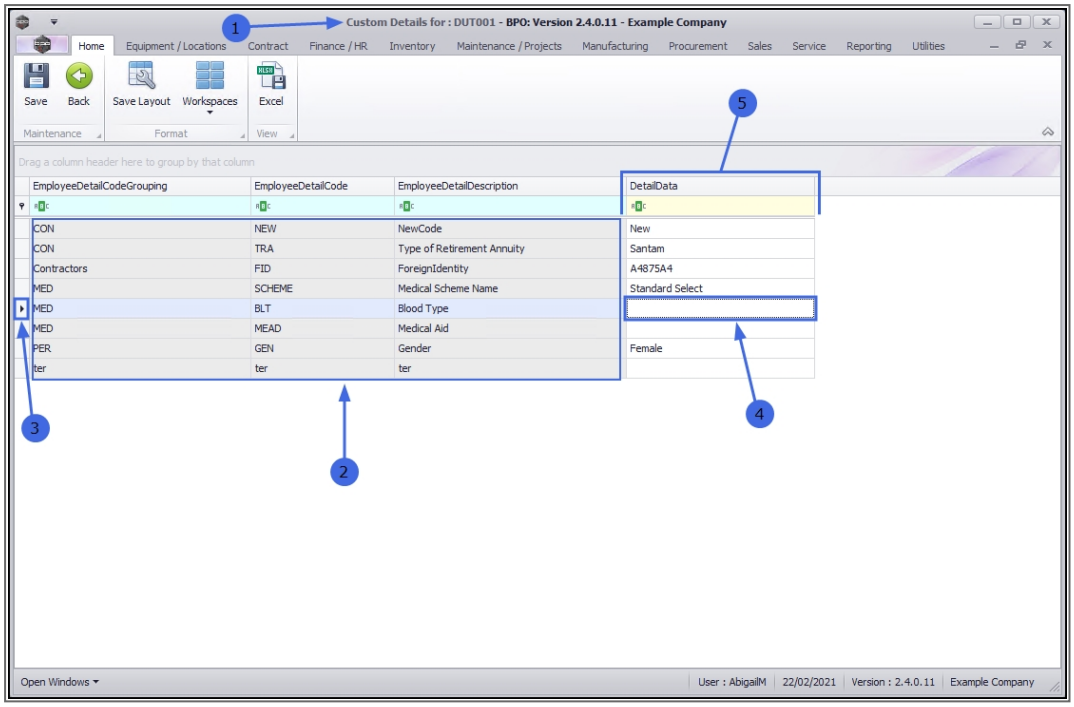

SAVE CUSTOM DETAIL DATA

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

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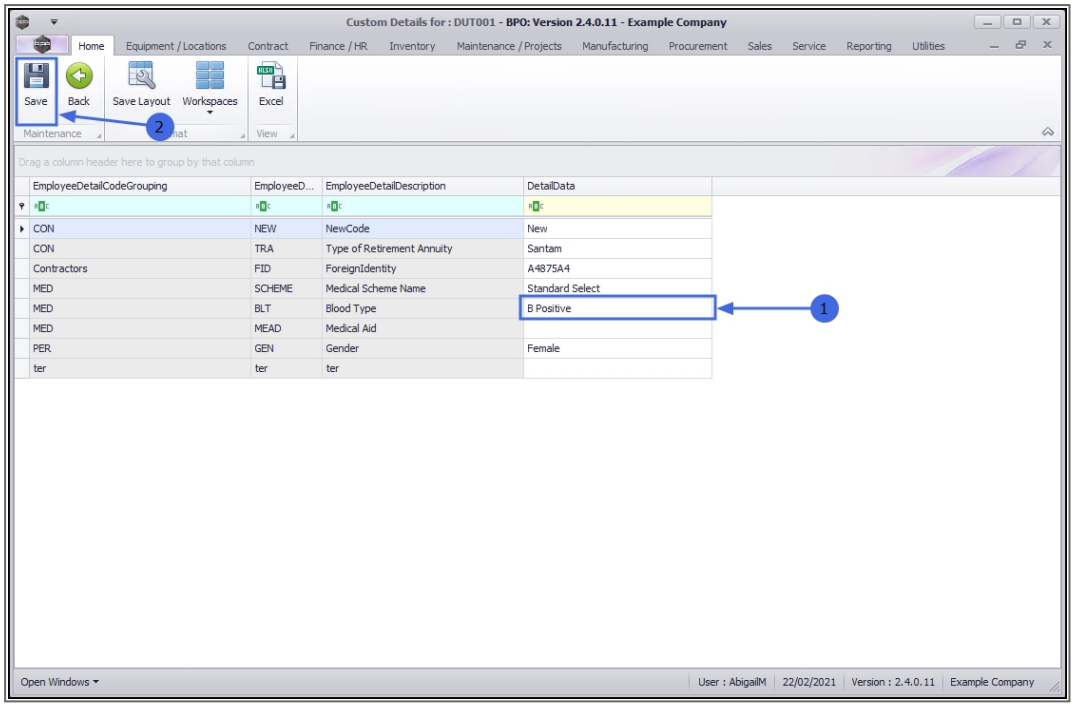

The details will be saved, and you will return to the ***Employees*** listing screen.

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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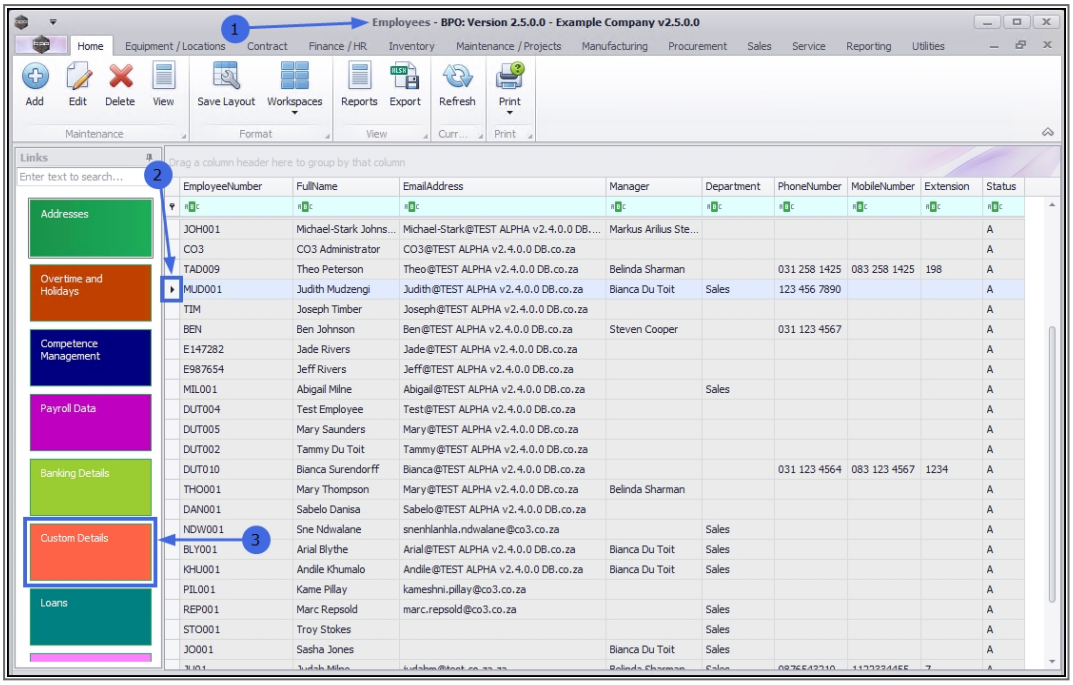

1. The ***Custom Details for: []*** screen will be displayed.
2. Edit the information you wish to change in the ***Detail Data*** column of that row. You can either backspace or highlight over the existing information and type in the new information.
    - In this example, the ***Blood Type*** is to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

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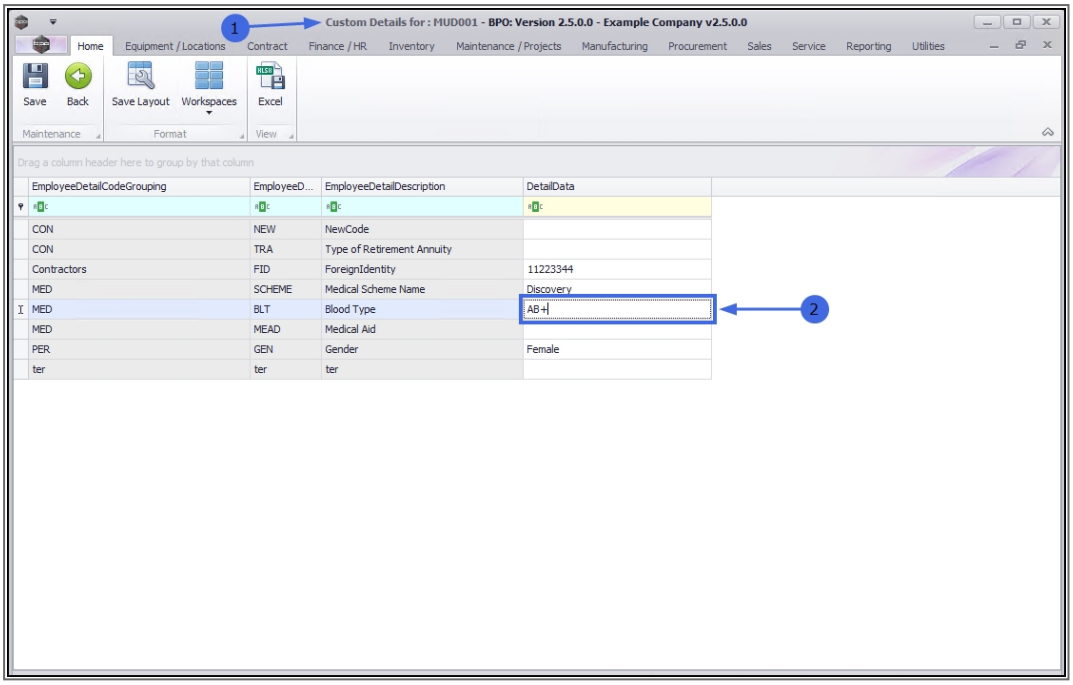
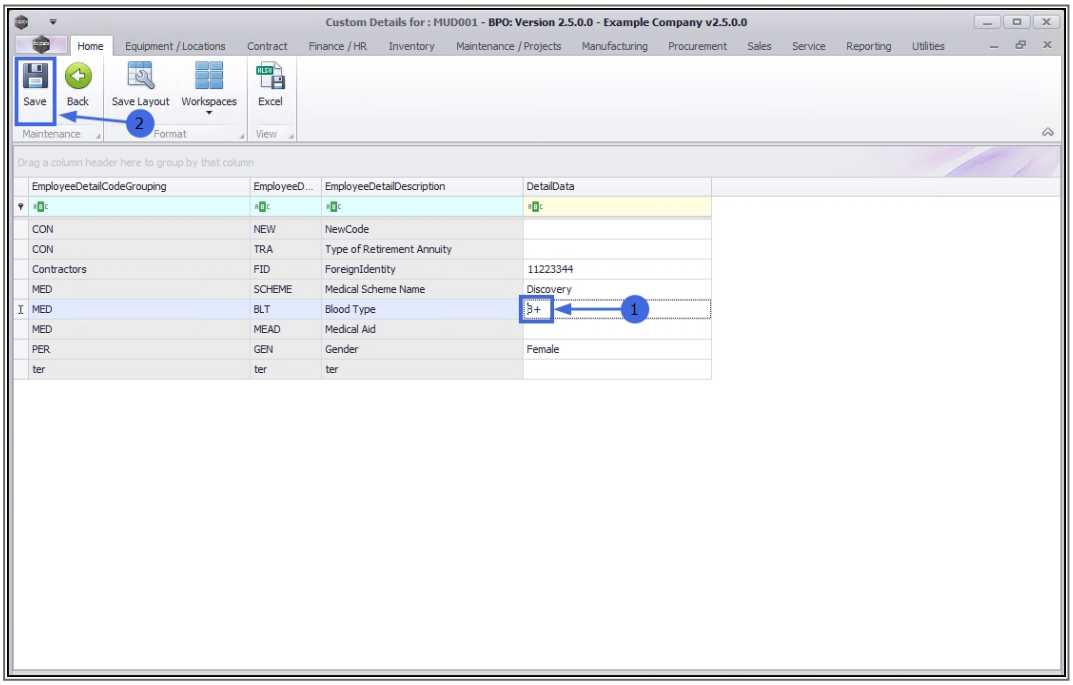


SAVE CUSTOM DETAIL EDITS

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



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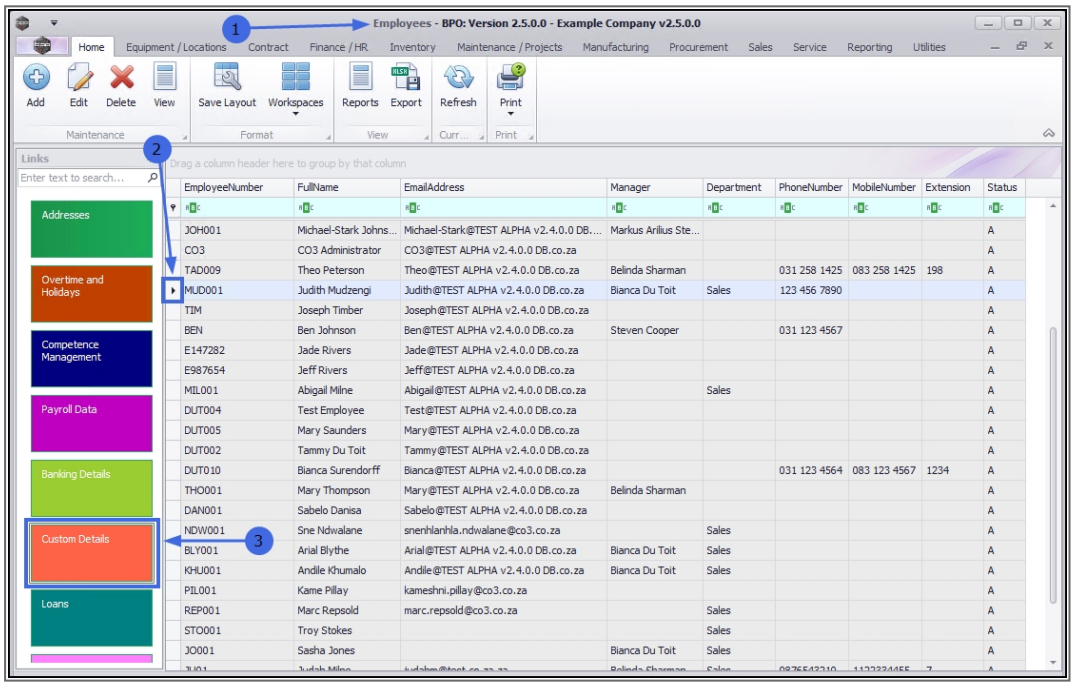
The edited details will be saved, and you will return to the ***Employees*** listing screen.

DELETE CUSTOM DETAILS DATA

SELECT EMPLOYEE

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



1. The ***Custom Details for: []*** screen will be displayed.
2. ***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.

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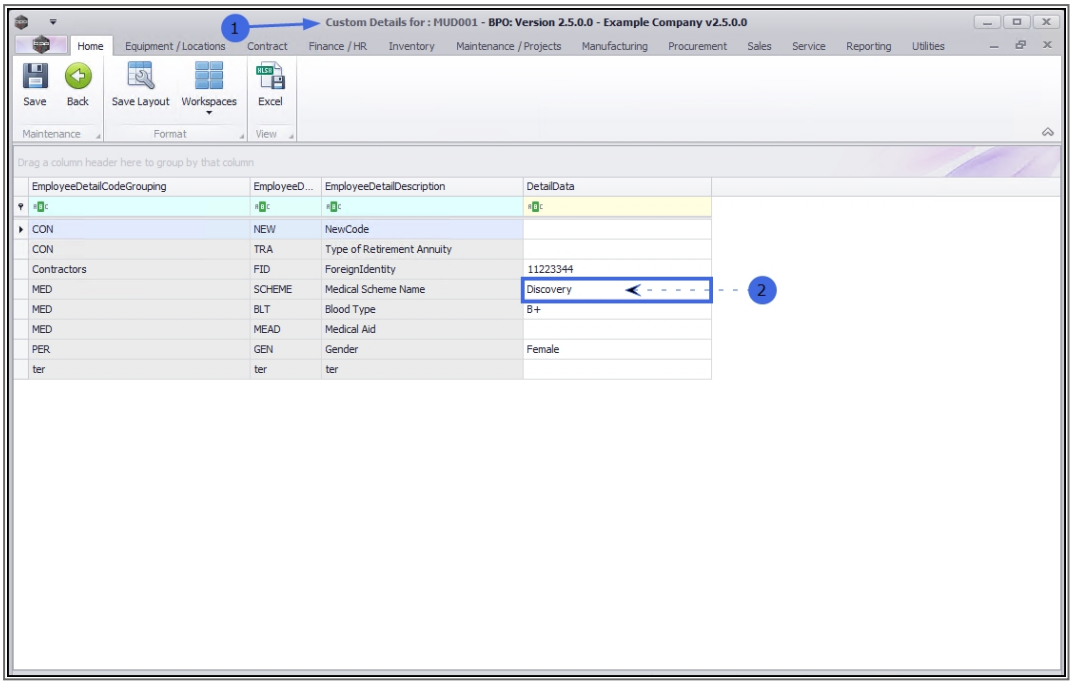
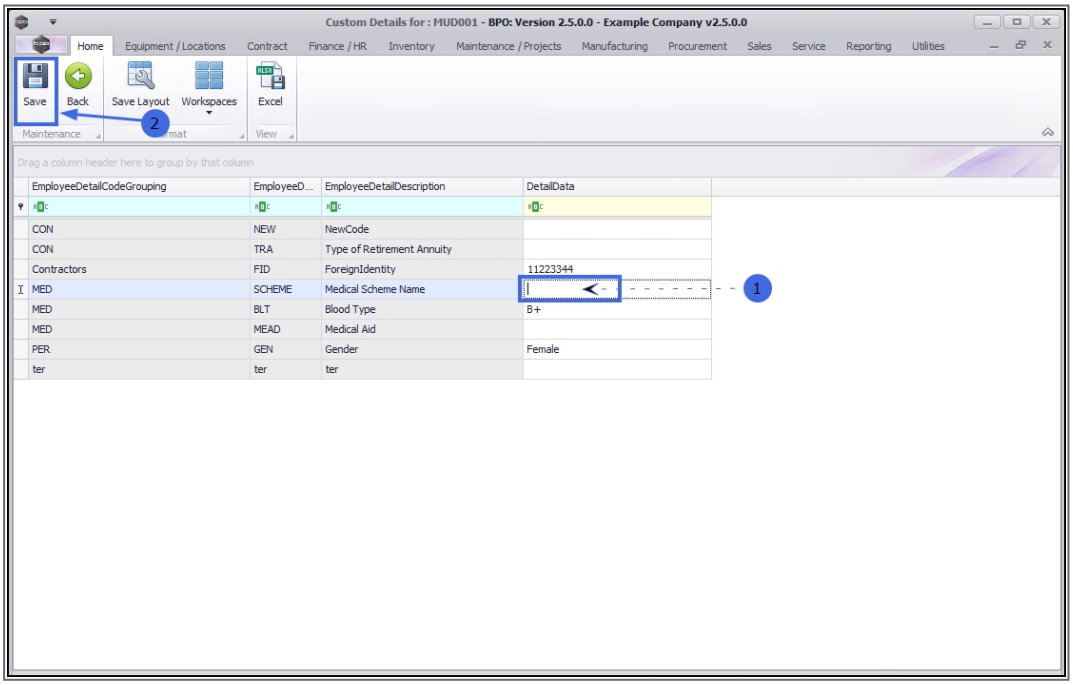


SAVE DELETION

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



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

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