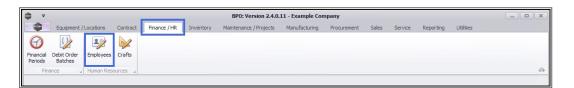


HUMAN RESOURCES

EMPLOYEES - LOANS

In the employee **Loans** screen, you can view any outstanding loan or advance amounts, as well as view the loan repayment schedule with the instalment dates and number of instalments remaining. This feature will enable the Human Resources department to effectively manage the loans of the employee.

Ribbon Access: Finance and HR > Employees



1. The *Employees* listing screen will open.

VIEW EMPLOYEE LOANS

SELECT EMPLOYEE

- 2. Select the *row* of the employee whose loan details you wish to *view*.
- 3. Click on the *Loans* tile.



Employee Loans

| Home Ec | quipment | / Locations Contrac | | ployees - BPO: Version 2.5.0.0 - Examp Inventory Maintenance / Projects Ma | |) rement Sales | Service F | Reporting Uti | lities | _ @ | |
|--------------------------|----------|------------------------|-------------------|---|-----------------|--------------------------|--------------|---------------|-----------|--------|--|
| Add Edit Delete | View | Save Layout Wo | orkspaces Reports | Export Curr | | | | | | | |
| nks | | rag a column header he | - | | | | | | 1 | | |
| nter text to search | Q | EmployeeNumber | FullName | EmailAddress | Manager | Department | PhoneNumber | MobileNumber | Extension | Status | |
| Addresses | ٩ | REC | REC | 4 0 0 | REC | R C | 10 C | 88c | REC | 8 B C | |
| Addresses | | 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 | |
| Overtime and | | BEN | Ben Johnson | Ben@TEST ALPHA v2.4.0.0 DB.co.za | Steven Cooper | | 031 123 4567 | | | A | |
| Holidays | | 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 | |
| | | MIL001 | Abigail Milne | Abigail@TEST ALPHA v2.4.0.0 DB.co.za | | Sales | | | | A | |
| Competence Management | | DUT004 | Test Employee | Test@TEST ALPHA v2.4.0.0 DB.co.za | | | | | | A | |
| | | 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 | | | | | | Α | |
| Payroll Data | | DUT010 | Bianca Surendorff | Bianca@TEST ALPHA v2.4.0.0 DB.co.za | | | 031 123 4564 | 083 123 4567 | 1234 | A | |
| | 2 | TH0001 | Mary Thompson | Mary@TEST ALPHA v2.4.0.0 DB.co.za | Belinda Sharman | | | | | Α | |
| | _ 1 | DAN001 | Sabelo Danisa | Sabelo@TEST ALPHA v2.4.0.0 DB.co.za | | | | | | Α | |
| Banking Details | | NDW001 | Sne Ndwalane | snenhlanhla.ndwalane@co3.co.za | | Sales | | | | Α | |
| | 1 | 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 | |
| Custom Details | Ľ | PIL001 | Kame Pillay | kameshni.pillay@co3.co.za | | | | | | A | |
| | | REP001 | Marc Repsold | marc.repsold@co3.co.za | | Sales | | | | A | |
| | | STO001 | Troy Stokes | | | Sales | | | | A | |
| Loans | | JO001 | Sasha Jones | | Bianca Du Toit | Sales | | | _ | A | |
| | | 3001 | Judah Milne | judahm@test.co.za.za | Belinda Sharman | Sales | 9876543210 | 1122334455 | 7 | A | |
| | | KES001 | Julanda Kessler | | | Sales | | | | A | |
| | | ROW001 | David Rowe | davidr@testemail.coza | Belinda Sharman | Sales | 222222 | 555555 | 2 | A | |

LOANS SCREEN OVERVIEW

1. The *Loans for: []* screen will open.

This screen is divided into **2** frames.

- 2. The top frame displays the *Loan(s)* details.
- 3. The lower frame displays the *Repayment(s)* schedule.
- 4. The *Loan Balance* amount can be viewed at the foot of the screen.
- 5. You will note that there is only a *Back* button in this screen, no changes can be made or saved here.



| | - | | | | | |
|--------------------------|-----------------------------------|--------------------------------|-----------------------------|----------------------|---------------------|-----------------------|
| Home Equ | Jipment / Locations Contract Fina | Loans for : PIL001 - BPO | | | Color Constant Data | porting Utilitie) — E |
| Back Save Lay | yout Workspaces | nice / nic inventior y _ inami | teriorice / Projects Manura | acturing Procurement | Sales Service Rep | oor ang Uturate |
| Maintena 🖌 | Form | | | | | |
| | | | 2 | | | |
| Contributor | PaySlipCode | Description | IRP5Code | Direction | Value | RunDate |
| ♀ 88C | 8 <mark>8</mark> C | 8 <mark>8</mark> 0 | 8 C | = | = | = |
| lepayments | | | 3 | | | |
| Drag a column header hei | re to group by that column | | 3 | | | |
| Drag a column header her | PaySlipCode | Description | IRP5Code | Direction | Value | RunDate |
| Drag a column header her | | Description | | Direction = | Value = | RunDate |
| | PaySlipCode | | IRP5Code | | | |

•••

This topic is currently being updated. Thank you for your patience, please check back soon.



MNU.021.017

Help v2.5.0.14 - Pg 3 - Printed: 25/06/2024