

HUMAN RESOURCES

EMPLOYEES - LINK MANAGER

It is important to <u>select the person who manages an employee</u>. This is linked to <u>BPO CRM</u> - where the manager will be able to see his team members sales progress.

Ribbon Access: Finance and HR > Employees

• =	BP0: Version 2.4.0.11 - Example Company												
	Equipment /	Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
Financial Periods	Debit Order Batches	Employees	Crafts										
Fit	nance 🦼	Human Res	ources 🦼										\diamond

1. The Employees listing screen will display.

SELECT EMPLOYEE

- 2. Select the *row* of the employee to whom you wish to link a *manager*.
- 3. Click on *Edit*.



Employees - Link Manager

• •	1	Emplo	yees - BPO: Version 2.5.0.0 - Example (Company v2.5.0.0				-		х
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Audresses	BAL001	Steven Cooper	Steven@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A	
	BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567			A	
	BLY001	Arial Blythe	Arial@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A	
Overtime and Holidays	CO3	CO3 Administrator	CO3@TEST ALPHA v2.4.0.0 DB.co.za						A	
	DAN001	Sabelo Danisa	Sabelo@TEST ALPHA v2.4.0.0 DB.co.za						A	
	DAV001	David Rowe	davidr@testemail.coza			01010101	03030303	01	A	
Competence	DG001	John Twain	John@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A	
Hanagement	DUT001	Bianca Du Toit	kameshni.pillay@co3.co.za	Belinda Sharman	Sales	031 123 4564	083 123 4567	1234	A	
	DUT002	Tammy Du Toit	Tammy@TEST ALPHA v2.4.0.0 DB.co.za						A	
Payroll Data	DUT004	Test Employee	Test@TEST ALPHA v2.4.0.0 DB.co.za						A	
	2 DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						Α	
	DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	Α	
Banking Details	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						A	
	EMP123	Carolina Suzzetta L	Carolina Suzzetta@TEST ALPHA v2.4.0.0	Bianca Du Toit					A	
Oustom Details	HAR001	Wesley Haynes	Wesley@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					Α	
Custom octails	JO001	Sasha Jones		Bianca Du Toit	Sales				Α	
	JOH001	Michael-Stark Johns	Michael-Stark@TEST ALPHA v2.4.0.0 DB	Markus Arilius Ste					A	
	JU01	Judah Milne	judahm@test.co.za.za	Belinda Sharman	Sales	9876543210	1122334455	7	A	
Loans	KES001	Julanda Kessler			Sales				Α	
	KHU001	Andile Khumalo	Andile@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				Α	
	MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				A	
	MUD001	Judith Mudaonai	Judith OTECT ALDHA VO 4.0 0 DP co. 75	Pinnen Du Toit	Color	172 456 7000			٨	4

SEARCH FOR MANAGER

- 1. The *Edit Employee* screen will be displayed.
- 2. Click on the *search* button in the *Manager* field.

\$ *	1	Edit Employee -	- BPO:	Version 2.5.0.0 - Ex	ample Company	y v2.5.0.0					C	_ 0	x
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	Second Name	Christopher	-		Royal Town						hat com	n /	
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	Passport Number	040400404	1	Postal Code			*						
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		-											
	<u> </u>					l	4	C					F



SELECT MANAGER

- 1. The *Select the Manager* screen will be displayed.
- Select the *row* of the *Manager* that you would like to allocate to this employee.
 - ° In this example, SHA001 Belinda Sharman is selected.
- 3. Click on OK.

\$ *		Edit Employee	BPO): Version	2.5.0.0 - Ex	ample Comp	any v2.5.0	.0							x
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burnang Octails	Manager	Α		BEN		Ben	Johnson	Ben Jo	hnson	в	Steven C	ooper			
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	Bank Name	-	1	Bra	nch Name				CraftNan	ne Cra	ftDesc	SiteDesc	ription	Accoun	tCode
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Loans	Account Number]	Aco	ount Type			•	CON C		nsulting	Durban	1100		
	Default Account														
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SAVE MANAGER

- 1. The selected manager is now assigned and displayed in the *Manager* field.
- 2. Click on *Save* to keep the manager details.



Home Equipment / Locations Contract Finance / HR Inventory Manufacturing Procurement Sales Service Reporting Utilities — # Back Save Layout Workspaces
Image: Save Layout Workspaces Processing Ormat Processing Ormat Physical Address 1 Royal House Dependants Enter text to search First Name David * Royal Road Drag a column header here to group by that Enter text to search Second Name Christopher Royal Town Firstiane MiddeName Lastiane IDNumber Bit
Links # Employee Number DAV001 Physical Address 1 Royal House Dependants Enter text to search // First Name David * Royal Road Drag a column header here to group by the search with the search withe search withe search with the search with the search with the s
Enter text to search First Name David First Name David First Name Christopher Royal Town First Name MiddeName LastName DNumber Bir
Second Name Christopher Royal Town FirstName MiddleName LastName IDNumber Bit
Addresses Initials DC • City Royal City • City Royal City • City Royal City
Last Name Rowe Province Royal Province
Duerthee and ID Number 01020304 Postal Code RYL01
Holdays Birth Date 28/06/1970 Country SA
Phone Number (W) 010101
Competence Extension(W) 01 Postal Address Shifts
Management Phone Number (H) 0202022 Drag a column header here to group by that
Fax Number StartDate ShiftName StartDay
Payrol Data 00000000 City - 10c -
EmailAddress davidr@testemail.coza Province + Colored
Passport Number 040400404 Postal Code
Banking Details Married V Country
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Department 20
Custom Details Using Craftman
Bank Name Branch Name Branch Name
Account Name Branch Code CON Consulting Durban 1100
Account Type
Default Account

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

	-			Edit Employee	- RD(Or Version 2.5.0.0 - Ex	ample Company v2 5 0 0								
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			Second Name	Christopher			Royal Town		FirstName	MiddleName	LastName	IDNumber	BirthD		
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• You will return to the *Employees* listing screen.

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