

HUMAN RESOURCES

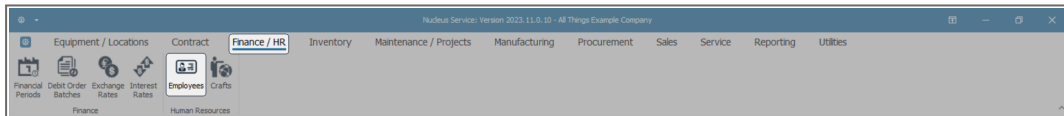
EMPLOYEES – BANKING DETAILS

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.

ID	Full Name	Email Address	Manager	Department Name
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	Aslirn Clay	Maintenance
643	Alexandra Aguiar	alexandra.aguiar@tattexampdomain.co.za	Timothy Palacios	0
559	Alexandra Daugherty	alexandra.daugherty@tattexampdomain.co.za	Valeria Gonzalez	Sales
179	Alexandra Huynh	alexandra.huynh@tattexampdomain.co.za	Leslie Miles	Implementations
181	Alexis Sales	alexis.sales@tattexampdomain.co.za	Leslie Miles	0
152	Alfred Nguyen	alfred.nguyen@tattexampdomain.co.za	Duce Nixon	Service Centre
349	Alia Branch	alia.branch@tattexampdomain.co.za	Malaysia Price	Administration
3	Alenna Fox	alenna.fox@tattexampdomain.co.za	Antonio Gordon	Accounts
1011	Alice Drew	alice.drew@tattexampdomain.co.za	Eden Rowan	Development
869	Allison Camacho	allison.camacho@tattexampdomain.co.za	Sofa Simmons	Administration
175	Allison Zamora	allison.zamora@tattexampdomain.co.za	Leslie Miles	Engineering
729	Alicia Estrada	alicia.estrada@tattexampdomain.co.za	Aren Alvarado	Projects
421	Allison Cuevas	allison.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	Andrey Skinner	Sales
587	Alma Jarvis	alma.jarvis@tattexampdomain.co.za	Lucy Knapp	Development
75	Alondra Dyer	alondra.dyer@tattexampdomain.co.za	Duce Nixon	Implementations
779	Alondra Gonzales	alondra.gonzales@tattexampdomain.co.za	Journey O'Connell	Sales
862	Alorso Morris	alorso.morris@tattexampdomain.co.za	Sofa Simmons	Administration
648	Alvaro Schwartz	alvaro.schwartz@tattexampdomain.co.za	Hanza Peterson	Manufacturing
654	Alvin Cobb	alvin.cobb@tattexampdomain.co.za	Timothy Palacios	Administration
375	Alyssa Archer	alyssa.archer@tattexampdomain.co.za	Adelyn Cherry	Operations

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

VIEW BANKING DETAILS

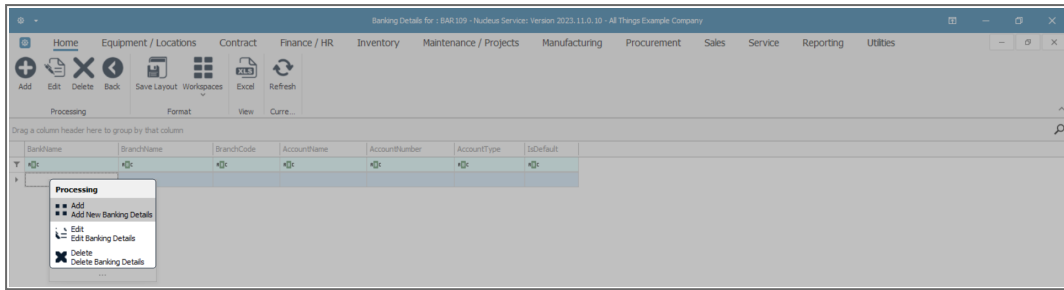
- Here you can view the banking information set up on the system for the selected employee.

ADD EMPLOYEE BANKING DETAILS

- Click on **Add**.

Branch Name	Branch Code	Account Name	Account Number	Account Type	IsDefault

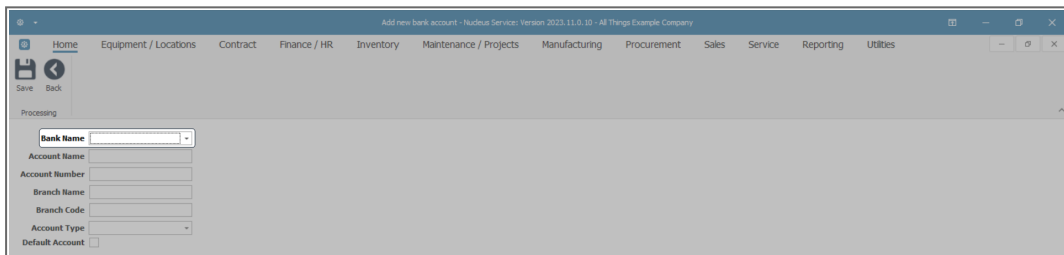
- Or **right-click** on any row in the list.
- A **Processing** menu will pop up.
- Click on **Add New Banking Details**.



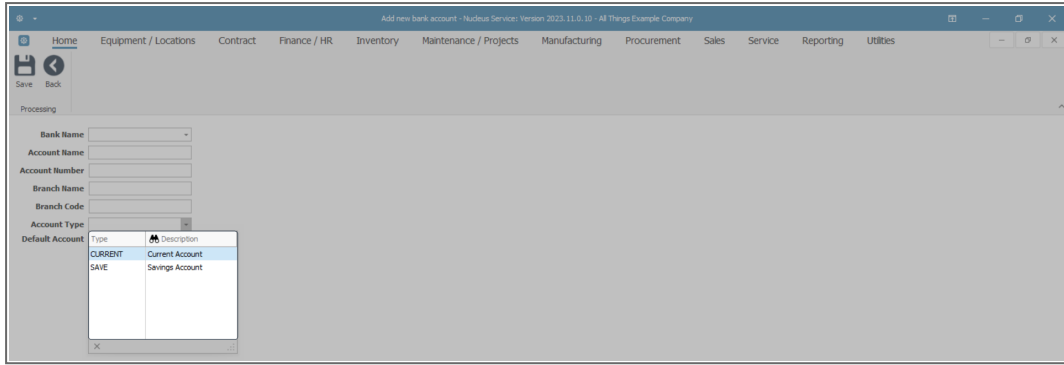
- The **Add new bank account** screen will open.

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.



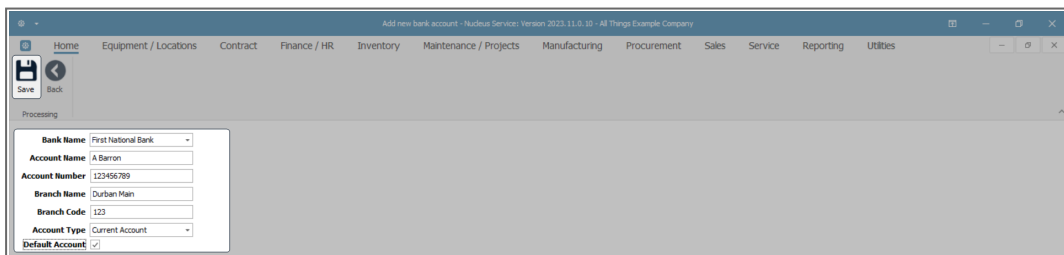
DEFAULT ACCOUNT

- **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.

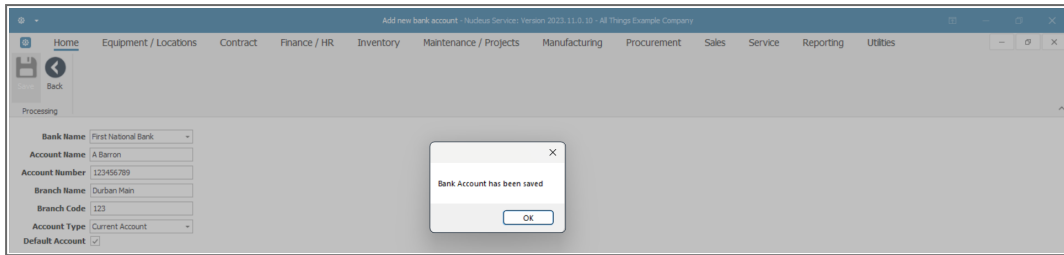
Note on Default Account: This is important if the employee has more than one account set up on the system. For example, one account may be the default for regular salary payments and a second account may be for bonus or expense payments.

SAVE BANK DETAILS

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

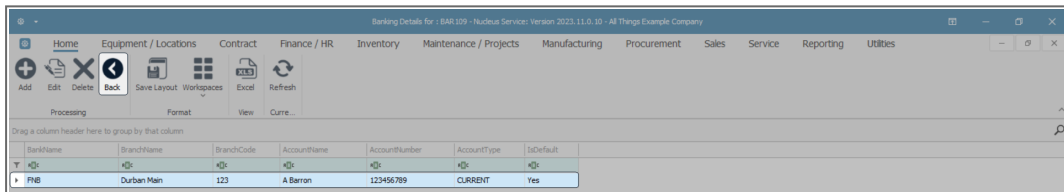


- A notification message box will pop up informing you -
 - **Bank account has been saved.**
- Click on **OK**.



VIEW SAVED BANK ACCOUNT

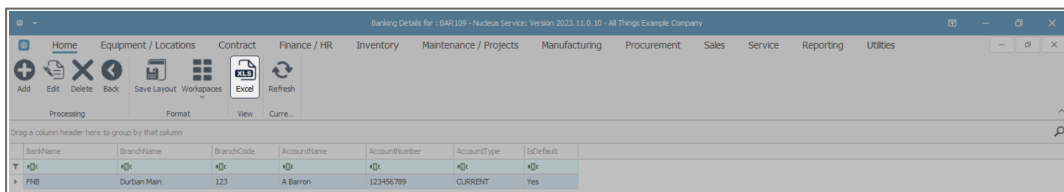
- You will return to the **Banking Details for: []** screen.
- The new bank details can now be viewed in the data grid.
- Note that the final column **IsDefault** reads as '**Yes**' as this bank account was selected as the **Default Account** in the previous step.
- Click on **Back** to return to the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



- Or export data to Excel, if required.

EXPORT TO EXCEL

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



- 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
FNB	Durban Main	123	A Barron	123456789	CURRENT	Yes

EDIT EMPLOYEE BANKING DETAILS

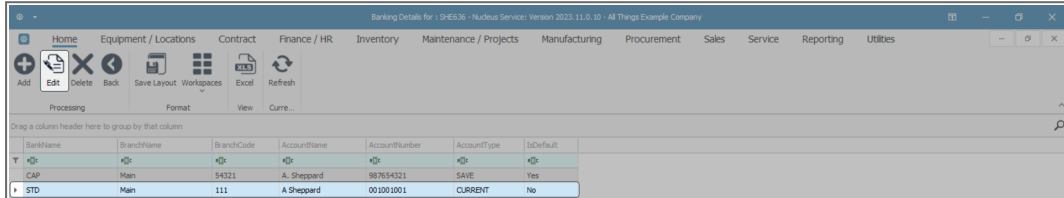
SELECT EMPLOYEE

- 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#	Employee#	FullName	EmailAddress	Manager	DepartmentName
825	R08989	Alanna Robertson	alanna.robertson@texampledomain.co.za	Sofia Simmons	Sales
115	SH636	Alanna Sheppard	alanna.sheppard@texampledomain.co.za	Dulce Nixon	Development
872	PER713	Alaric Perkins	alaric.perkins@texampledomain.co.za	Sofia Simmons	Sales
101	GLE261	Alaya Guerrero	alaya.guerrero@texampledomain.co.za	Dulce Nixon	Service Centre
300	HEN531	Albert Herson	albert.herson@texampledomain.co.za	Harley Briggs	Quality Assurance
19	SN261	Aleena Singh	aleena.singh@texampledomain.co.za	Elanna Pugh	Human Resources
291	WAR246	Aleena Ware	aleena.ware@texampledomain.co.za	Rory Schneider	Marketing
400	RAB109	Alex Barron	alex.barron@texampledomain.co.za	Corbin McConnell	Projects
724	CO3656	Alexander Coleman	alexander.coleman@texampledomain.co.za	Roman Simpson	Service Centre
287	SH6787	Alexandra Sheppard	alexandra.sheppard@texampledomain.co.za	Ashlin Clay	Maintenance
643	AGU269	Alexandra Aguirre	alexandra.aguirre@texampledomain.co.za	Timothy Palacios	0
559	DAU006	Alexandra Daugherty	alexandra.daugherty@texampledomain.co.za	Violeta Spence	Sales
179	HUY032	Alexandra Huynh	alexandra.huynh@texampledomain.co.za	Leslie Mies	Implementations
181	SAL398	Alexis Salas	alexis.salas@texampledomain.co.za	Leslie Mies	0
152	NGU219	Alfred Nguyen	alfred.nguyen@texampledomain.co.za	Dulce Nixon	Service Centre
349	BRAB79	Alia Branch	alia.branch@texampledomain.co.za	Malaysia Price	Administration
3	FOX967	Alanna Fox	alanna.fox@texampledomain.co.za	Antonio Gordon	Accounts
1011	DRE001	Alice Drew	alice.drew@texampledomain.co.za	Eden Rowan	Development
869	CAN634	Alison Caniche	alison.caniche@texampledomain.co.za	Sofia Simmons	Administration
175	ZAM565	Alison Zamora	alison.zamora@texampledomain.co.za	Leslie Mies	Engineering
230	EST965	Alie Estrada	alie.estrada@texampledomain.co.za	Averi Alvarado	Projects
481	CUE036	Allison Cuevas	allison.cuevas@texampledomain.co.za	Bella Chase	Contracts
463	BEH946	Allyson Bender	allyson.bender@texampledomain.co.za	Zavier Patton	Service Centre
51	DUR589	Alma Duran	alma.duran@texampledomain.co.za	Anley Skinner	Sales
587	JAR933	Alma Jarvis	alma.jarvis@texampledomain.co.za	Lucy Khapp	Development
75	DYE118	Alonda Dyer	alonda.dyer@texampledomain.co.za	Dulce Nixon	Implementations

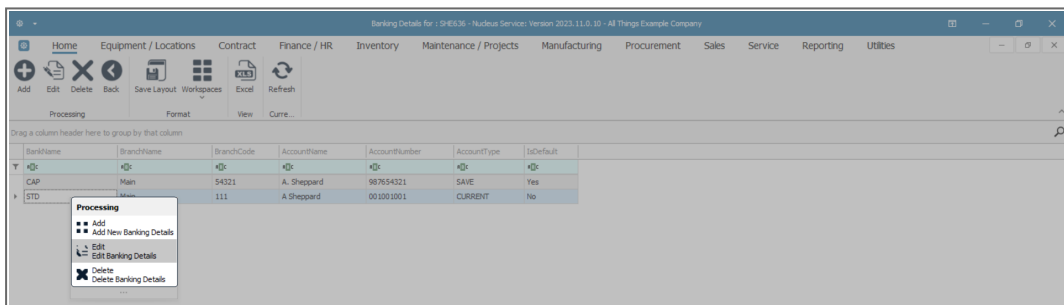
SELECT BANKING DETAILS TO EDIT

- 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**.



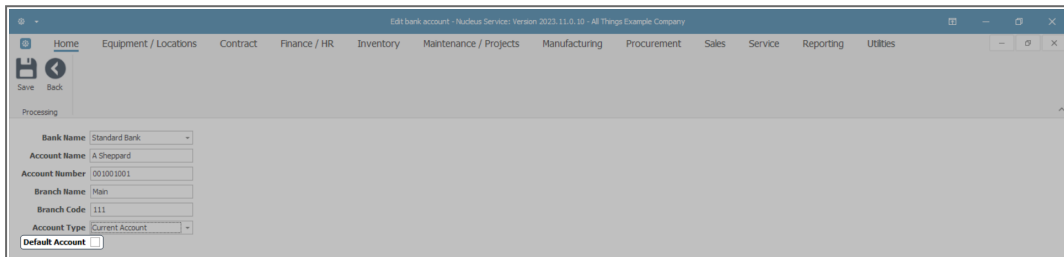
BankName	BranchName	BranchCode	AccountName	AccountNumber	AccountType	IsDefault
CAP	Main	54321	A. Sheppard	987654321	SAVE	Yes
STD	Main	111	A. Sheppard	001001001	CURRENT	No

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

EDIT BANKING DETAILS

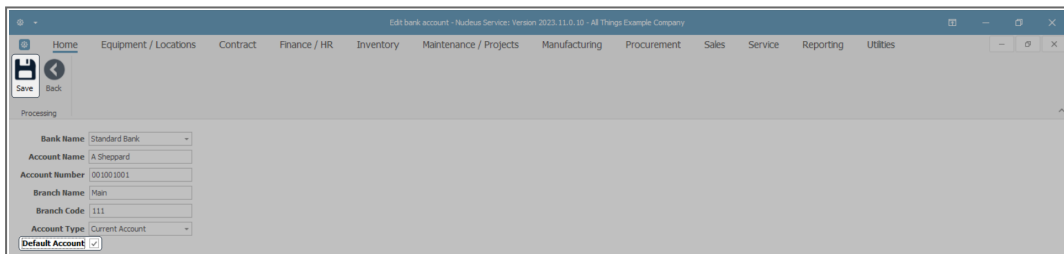
- All of the fields, except **Bank Name** and **Account Type** and the **Default Account** check box, require the edited details to be typed directly into the text boxes.

- 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.

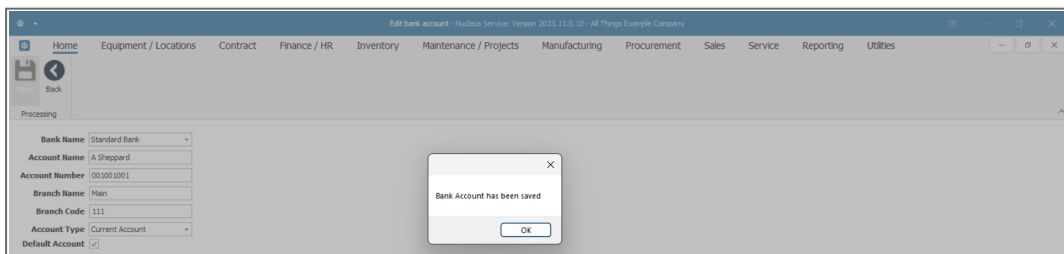


SAVE EDITED DETAILS

- 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	BranchName	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

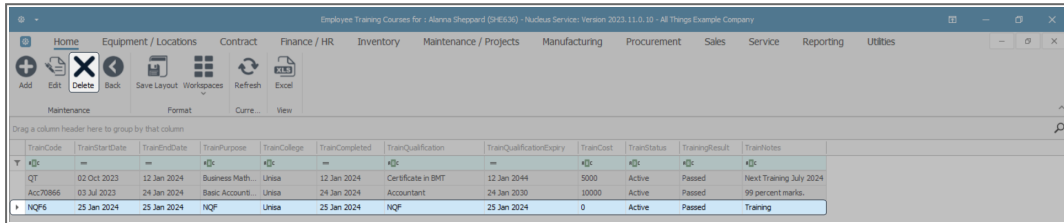
SELECT EMPLOYEE

- 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.

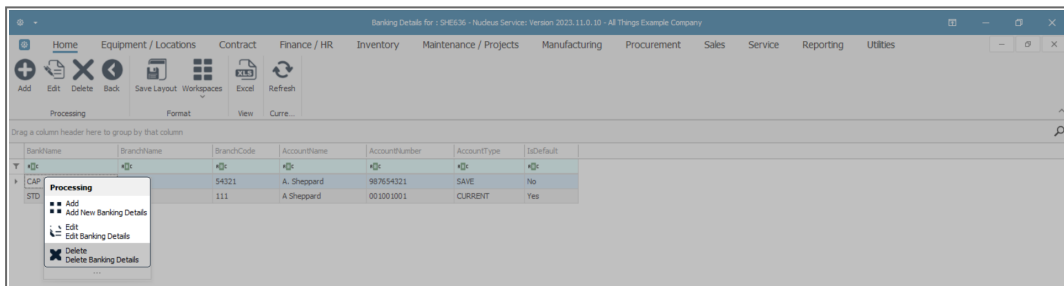
EmployeeNo	FullName	EmailAddress	Manager	DepartmentName
826	BON090	alanna.robertson@tattexampdomain.co.za	SOFA SIMMONS	Sales
115	SH6536	alanna.sheppard@tattexampdomain.co.za	Dulce Nixon	Development
872	PER123	alanic.perlino@tattexampdomain.co.za	Sofia Simmons	Sales
101	GLE261	alaya.guerrero@tattexampdomain.co.za	Dulce Nixon	Service Centre
300	HEN531	albert.henson@tattexampdomain.co.za	Harley Briggs	Quality Assurance
19	SIN261	aleena.singh@tattexampdomain.co.za	Elanna Pugh	Human Resources
291	WAR246	aleena.ware@tattexampdomain.co.za	Rory Schneider	Marketing
400	BAR109	alex.barron@tattexampdomain.co.za	Corbin McConnell	Projects
724	COL656	alexander.coleman@tattexampdomain.co.za	Roman Simpson	Service Centre
287	SHE787	alexandra.sheppard@tattexampdomain.co.za	Aislinn Clay	Maintenance
643	AGU299	alexandria.aguirre@tattexampdomain.co.za	Timothy Palacios	0
559	DAU006	alexandria.dougherty@tattexampdomain.co.za	Valdita Genove	Sales
179	HUY032	alexandria.huynh@tattexampdomain.co.za	Leslie Miles	Implementations
181	SAL398	alexis.salas@tattexampdomain.co.za	Leslie Miles	0
152	NGU219	alfred.nguyen@tattexampdomain.co.za	Dulce Nixon	Service Centre
349	BR4879	ala.branch@tattexampdomain.co.za	Malaysia Price	Administration
3	FOX967	alanna.fox@tattexampdomain.co.za	Antonio Gordon	Accounts
1011	DRE001	Alice Drew	Eden Rowan	Development
869	CAM534	alison.camacho@tattexampdomain.co.za	Sofia Simmons	Administration
175	ZAM565	alison.zamora@tattexampdomain.co.za	Leslie Miles	Engineering
729	EST969	alle.estrada@tattexampdomain.co.za	Aveli Alvarado	Projects
481	CU8036	alison.cuervo@tattexampdomain.co.za	Beth Chase	Contracts
463	REN946	alison.bender@tattexampdomain.co.za	Zavier Patton	Service Centre
51	DUR589	alma.duran@tattexampdomain.co.za	Ansel Skinner	Sales
587	JAR933	alma.jarvis@tattexampdomain.co.za	Lucy Knapp	Development
75	DYE318	alonda.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**.

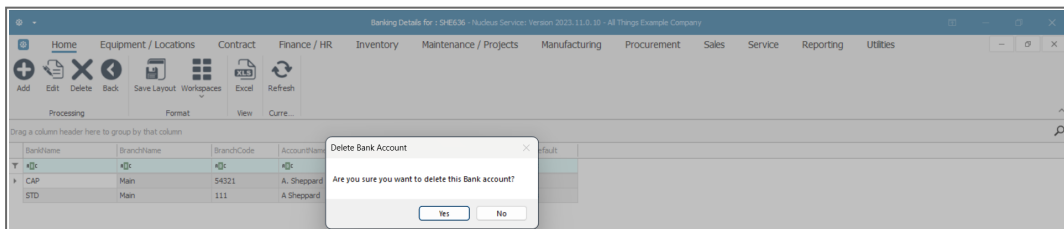


- Or **right-click** on the **row** that you wish to **delete**.
- A **Process** menu will pop up.
- Click on **Delete Training Course**.

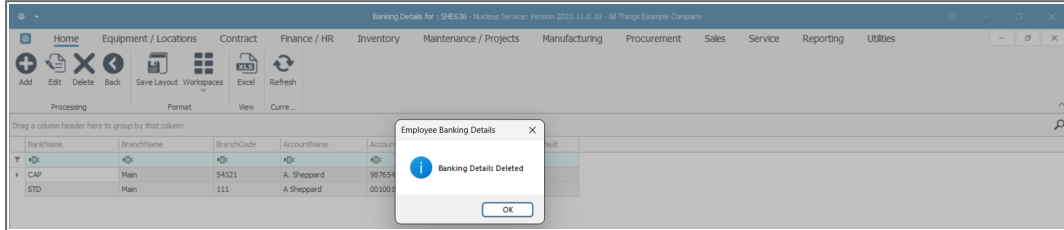


CONFIRM DELETION

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

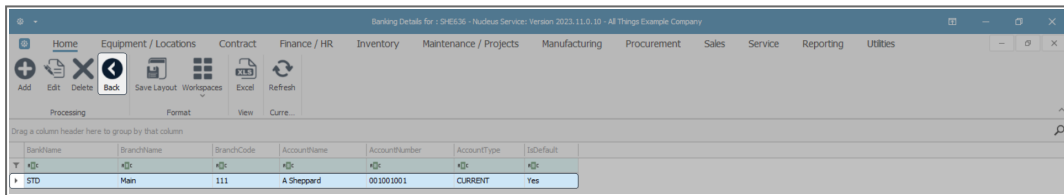


- An **Employee Banking Details** message box will pop up informing you -
 - **Banking Details Deleted.**
- Click on **OK**.



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.



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