


# Employees

Below actions are available under **“Employees”**:

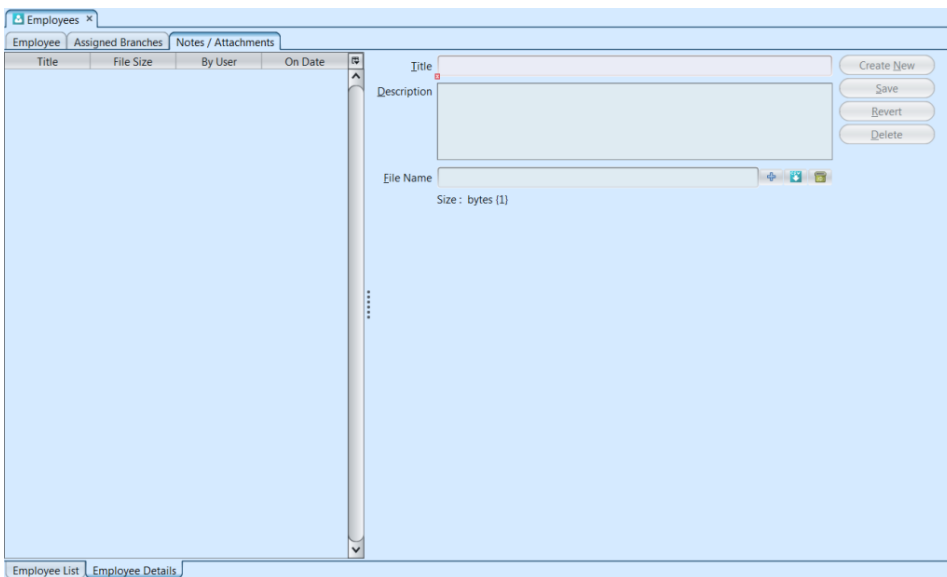
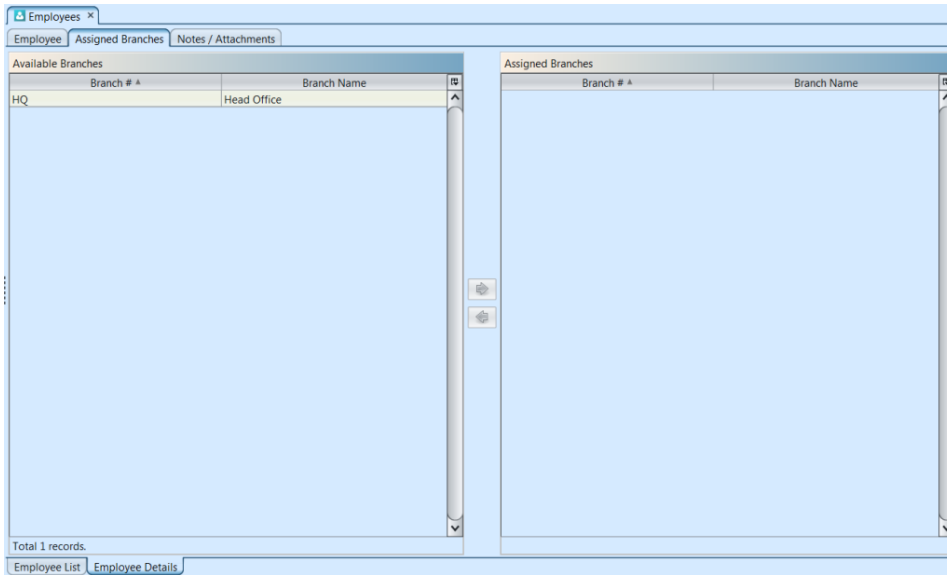
 Create new employee; update, delete, view and search for employee details

Employee Code *	Employee Name	NRIC Number	Currency	Current Balance	Status
EM01	Christopher	S1234567H	SGD	S\$513.60 Cr	Confirmed
EM02	Amanda	S1652347A	SGD	S\$100.00 Cr	Confirmed
EM03	Jessica	S98235067C	SGD		Confirmed
EM04	Tony	S8845213J	SGD	S\$1,365.00 Cr	Confirmed
EM05	Ehy Ee		SGD	S\$12.00 Cr	Confirmed
EP07	Jessica	S3473924R	SGD	S\$31.95 Cr	Confirmed
SI01	Steve Jameson		USD		Confirmed

Employee Name: [ ] Employee Code: [ ] NRIC Number: [ ] Tax Number: [ ]  
Currency: SGD - Singapore Dollar Grouping Account: [ ] Current Balance: [ ] Language: [ ]

Settings  
Account Settings: [ ] Employee Type: [ ] System User: [ ] Bank Reference: [ ]  
Join Date: [ ] Date Of Birth: [ ] Description: [ ]  
Emergency Contact: [ ]  Is Sales Representative

Address  
Location: [ ]  
Country: [ ] State: [ ]  
City: [ ] Postal Code: [ ]  
Phone: [ ] Phone2: [ ] Fax: [ ]  
Email: [ ] Website: [ ]

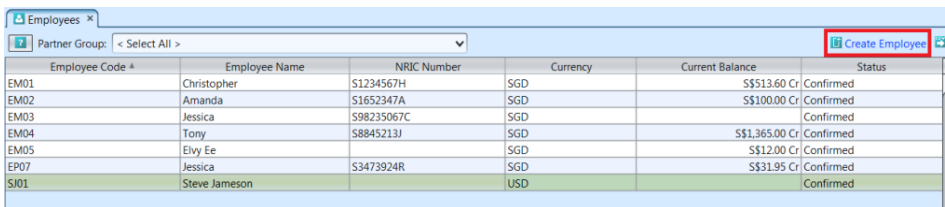


Field Name	Description	Mandatory Information
Employee Name	Name of the employee	Y
Employee Code	Code of the employee.	Y
NRIC Number	The National Registration Identity Card number of the employee	N
Tax Number	Taxpayer Identification Number of the employee	N
Currency	Salary currency for the employee	Y
Grouping Account	Account for employee's payables and receivables	Y
Current Balance	Balance owed to/by the employee	N
Language	Language used by the employee	N
Account Setting	Defines journal entry to be used in transaction, usually for Finance/Account/HR department	N

Employee Type	Type of employee	N
System User	User Name of the employee	N
Bank Reference	Name of the bank or bank account number	N
Join Date	Date of employee joined the company	N
Date of Birth	Date of Birth of employee	N
Emergency Contact	Emergency contact person or number of employee	N
Description	Description	N
Address	Address of the employee	N
Phone/Phone 2	Contact number	N
Email	E-mail address	N
Fax	Fax number	N
Website	Website URL address	N

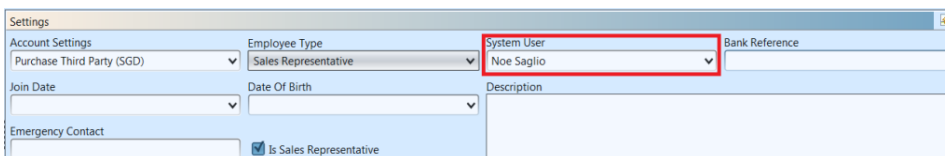
## Create New Employee:

1. Click on **“Create Employee”** at the top of screen of **“Employee List”** tab, it will open **“Employee Details”** tab with empty form



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EM02	Amanda	S1652347A	SGD	\$100.00 Cr	Confirmed
EM03	Jessica	S98235067C	SGD		Confirmed
EM04	Tony	S8845213J	SGD	\$1,365.00 Cr	Confirmed
EM05	Elvy Ee		SGD	\$12.00 Cr	Confirmed
EP07	Jessica	S3473924R	SGD	\$31.95 Cr	Confirmed
SI01	Steve Jameson		USD		Confirmed

2. Fill up employee’s information, select a username if employee is a (Samoa) system user with login access



Settings

Account Settings: Purchase Third Party (SGD)

Employee Type: Sales Representative

System User: Noe Saglio

Bank Reference: [Empty]

Join Date: [Empty]

Date Of Birth: [Empty]

Description: [Empty]

Emergency Contact: [Empty]

Is Sales Representative

“Sales Representative” Employee Type (list) indicates that the employee is also a retail employee type (for POS module). This will allow company to set them as POS Manager / Cashier.

The screenshot shows the 'Settings' window with the following fields:
 

- Account Settings: Purchase Third Party (SGD)
- Employee Type: Sales Representative (highlighted with a red box)
- System User: Noe Saglio
- Bank Reference: (empty)
- Join Date: (empty)
- Date Of Birth: (empty)
- Description: (empty)
- Emergency Contact: (empty)
- Is Sales Representative:  (highlighted with a red box)

“Is Sales Representative” checkbox when ticked, allows the user to select the employee as sales representative in transaction documents like Purchase Order, Sales Order, etc.

This screenshot is identical to the previous one, showing the 'Settings' window with the 'Is Sales Representative' checkbox checked and highlighted with a red box.

3. Enter Employee’s location address and click “Add” button to save and create new one

The screenshot shows the 'Address' window with the following fields:
 

- Location: Vivo Suite
- Country: SGD - Singapore
- State: (empty)
- City: (empty)
- Postal Code: 747872
- Phone: (empty)
- Phone2: (empty)
- Fax: (empty)
- Email: (empty)
- Website: (empty)
- Shipping Address:
- Billing Address:
- Order From Address:
- Add: (highlighted with a red box)
- Revert: (disabled)

4. Click on “**Assigned Branches**” tab at the top of screen to assign branch for the employee

5. Optional: Click on “**Notes / Attachments**” tab at the top of screen to add notes or files attachment for the employee

6. Click on “**Save**” button at the bottom of screen when completed

7. Click on “**Confirm Employee**” button at the bottom of screen to confirm new employee entry

8. Click on “**Close Employee**” button at the bottom of screen to close employee record from further transaction / changes (e.g. in the case an employee resign)

9. Click on “**Reopen Employee**” button at the bottom of screen to reopen employee record

10. Click on “**Create New**” button at the bottom of

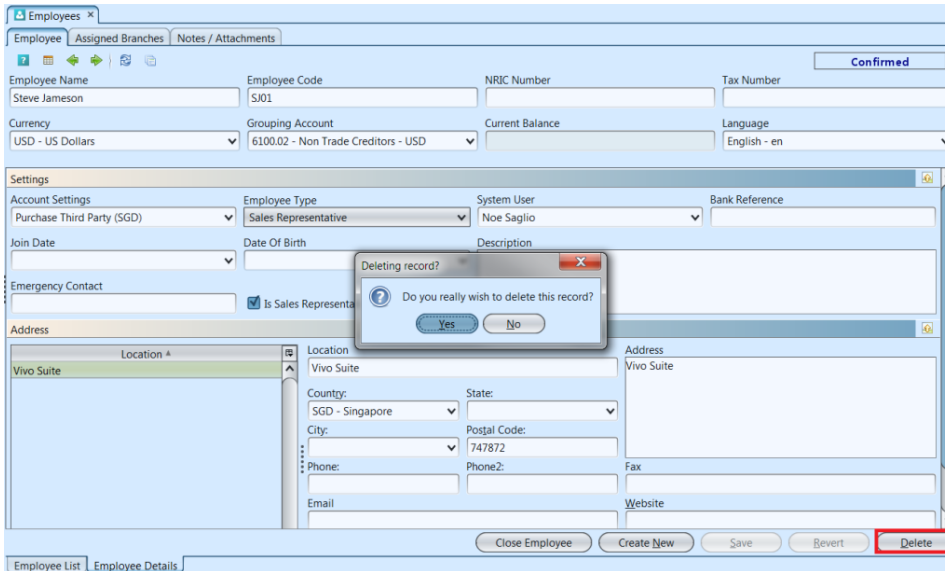
screen to create another new employee

## Update Employee Details:

1. Click on ***“Employee List”*** tab at the bottom of screen
2. Double click on employee to be updated, it will bring up ***“Employee Details”*** tab for the selected employee
3. Make change(s) on the employee information
4. Click on ***“Save”*** button at the bottom of screen when done
5. Click on ***“Revert”*** button at the bottom of screen.
6. Click on ***“Close Employee”*** button at the bottom of screen to close employee record from further transaction / changes (e.g. in the case an employee has resigned)
7. Click on ***“Reopen Employee”*** button at the bottom of screen to reopen employee record

## Delete Employee:

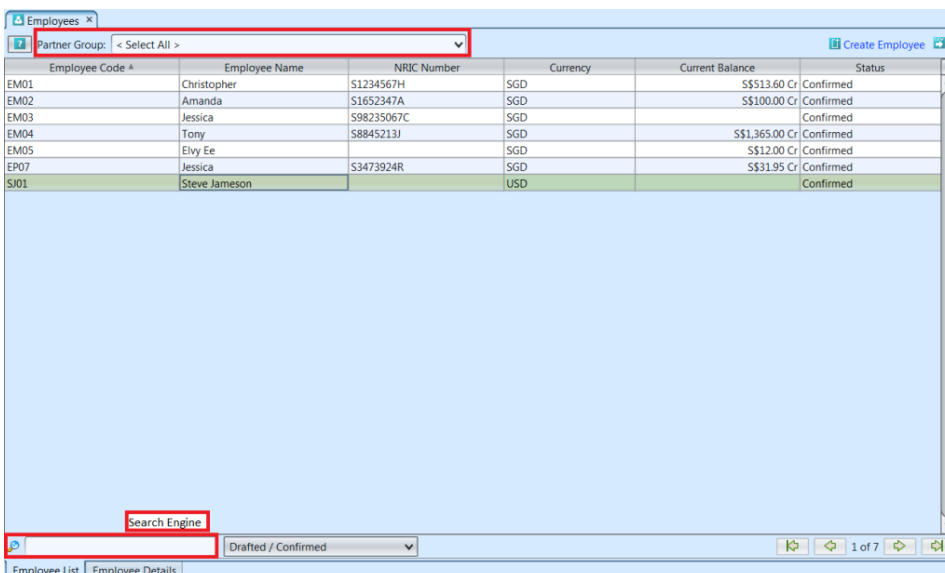
1. Click on ***“Employee List”*** tab at the bottom of screen
2. Double click on employee to be deleted, it will bring up ***“Employee Details”*** tab for the selected employee
3. Click on ***“Delete”*** button at the bottom of screen
4. Click on ***“Yes”*** button on the pop-up window to confirm record deletion



## View and Search for Employee Details

1. Click on **“Employee List”** tab at the bottom of screen

2. Enter search parameter to filter the result, i.e. type in group type for the employee in the **“Partner Group”** text field box or select from drop-down list. Partner Group is defined in the **Accounts module**



3. Result can be sorted alphabetically by clicking the fields' columns

4. Double click on employee to view full details of the employee, it will bring up the details on

***“Employee Detail”*** tab for the selected employee

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