

Staff Master

User can add staff records to b2b system, define their access rights and arrange their rosters depending on their job natures. Users can reset passwords and manage user accounts, including inactivating, deleting, or undoing such actions, or searching for or viewing records of particular staff.

Add new staff

Go to Staff > Staff > New

New staff	
Staff code *** must input	<input type="text"/> (Maximum 15 characters, please avoid input ', !, @, \$, #, %, ^, &, *, space.) [If the staff is a user, staff login= staff code.]
Default shop *** must input	Please select <input type="button" value="v"/>
Staff name *** must input	<input type="text"/> (Maximum 100 characters)
English full name	<input type="text"/> (Maximum 100 characters)
Chinese full name	<input type="text"/> (Maximum 100 characters)
Gender	F <input type="button" value="v"/>
Identity card	<input type="text"/> (Maximum 50 characters)
Marital Status	Single / Divorced <input type="button" value="v"/>
Join date	2 <input type="button" value="v"/> / Sep <input type="button" value="v"/> / 2020

-  Staff code: If the employee identity including user, the staff code must be used to login the system.
-  Default shop: Select a shop based on which the employee belongs to. If the employee does not belong to any shop, such as a logistics employee, you can choose a flagship store for them.
-  Staff name: Must be input.
-  English full name, Chinese full name, Gender, Identity card, Marital Status, Join date: Use for personal records.

**Authorised payroll users : Amy (S007), Anna (S004), Anna Tsui (Anna), cobi ng (MK001), cobi_testing (MK002), Gary (S002), Ivy Lee (beauty)	
Basic salary (Only allow authorised payroll users to input)	\$ <input type="text"/>
MPF (Only allow authorised payroll users to input)	<input checked="" type="checkbox"/> Yes
Meal breaks	<input type="text"/> Minutes (Maximum 3 characters)
Meal breaks with pay	<input checked="" type="checkbox"/> Yes
Rest days with pay	<input checked="" type="checkbox"/> Yes

-  Basic salary (Only allow authorised payroll users to input): Enter the employee's basic salary amount.
-  MPF (Only allow authorised payroll users to input) : Tick the box to calculate MPF for employees.
-  Meal breaks (Require staff attendance function): Input meal time to facilitate the system to calculate attendance.
-  Meal breaks with pay (Require staff attendance function): Select whether the meal breaks are paid to facilitate the system to calculate salary.
-  Rest days with pay (Require employee salary function): Select whether the rest days are paid to facilitate the system to calculate salary.



Payroll payment method (Only allow authorised payroll users to input)	Bank <input type="text"/>
Bank name (Only allow authorised payroll users to input)	<input type="text"/> (Maximum 200 characters)
Account no (Only allow authorised payroll users to input)	<input type="text"/> (Maximum 200 characters)
Account name (Only allow authorised payroll users to input)	<input type="text"/> (Maximum 200 characters)
Probation period (Only allow authorised payroll users to input)	<input type="text"/> Day <input type="text"/>
Notice period (Only allow authorised payroll users to input)	<input type="text"/> Day <input type="text"/>
Calculate annual leave	<input checked="" type="checkbox"/> Not required
Time attendance	<input checked="" type="checkbox"/> Not required

- Payroll payment method, Bank name, Account no, Account name (Only allow authorised payroll users to input): Enter the salary payment method and bank information to facilitate the arrangement of salary payments for employees.
- Probation period (Only allow authorised payroll users to input): Enter the probation period.
- Notice period (Only allow authorised payroll users to input): Enter the notice period to facilitate the system to calculate salary when the employee resigns.
- Calculate annual leave/ time attendance: (Requires employee attendance system): If the employee does not need to calculate annual leave/ time attendance, tick the box. This employee will not be displayed in the related report.

<u>Staff system identity</u>	
User ***	<input checked="" type="checkbox"/> Yes [Users can login to the system.]
Sales ***	<input checked="" type="checkbox"/> Yes [Sales can receive commission. Sales code can be used as a criterion for sales analysis.]
Therapist ***	<input checked="" type="checkbox"/> Yes [Therapist can accept booking, finish treatment and receive wages. Therapist code can be used as a criterions for treatment done analysis.]
Default system	English <input type="text"/>

- Staff system identity: Identity includes user, sales and therapist. Employee can have three identities at the same time, or one or two. Tick the box to arrange the identity for the employee.
- Default system: Select the default language for employees to log in to the system as English or Traditional Chinese. After logging into the system, employees can switch languages at any time.

User	
User access group	Account Department <input type="button" value="v"/>
Not allow to view and edit user access group	<input type="checkbox"/> Yes
Shop and warehouse access setup	<input checked="" type="checkbox"/> Allow user setup shop and warehouse access
Shop access	<input type="button" value="Setup"/>
Warehouse access	<input type="button" value="Setup"/>
Password ***	<input type="text"/> (6-15 characters)
Confirm password ***	<input type="text"/> (6-15 characters)

-  User access group: System assign authority to users according selected user access group.
-  Shop and warehouse access setup: (Require shop /warehouse access right): Select the box to allow this staff to assign branch and warehouse permissions to other users.
-  Shop access/ Warehouse access (Require shop /warehouse access right): Click <Setup> and select the box to assign shop/warehouse access right to this user. If system has one shop and warehouse only, you can skip the setting. The system will assign the permissions of the default shop and warehouse to the user.
-  Password : The user can setup login password. Users provide "login" and "password" to employees, so that employees can log in to the system.

Allow view other staff time attendance	<input type="checkbox"/> Yes
Allow setup staff attendance report cut off date	<input type="checkbox"/> Yes
View other staff roster right	View all <input type="button" value="v"/>
Allow view other staff leave	Allow view own leave only <input type="button" value="v"/>
Allow apply other staff leave	Allow apply own leave only <input type="button" value="v"/>
Allow view all staff salary details	Not allow, can view own salary only <input type="button" value="v"/>

The following items can be set according to the user's authority:

-  Allow view other staff time attendance (Requires staff attendance function): If the employee has the permission to view the attendance report, the system control that he can view his own records only. Select "Yes", employees can view other employees' attendance records.
-  Allow setup staff attendance report cut off date (Requires staff attendance function): If the employee has the permission to view the attendance report and select "Yes", the employee can set up cutoff date for the report.
-  View other staff roster right (Requires staff attendance function): You can choose to allow employees to view "All staffs", "All shops" or "Only view own".
-  Allow view other staff leave (Requires staff holiday function): You can choose to allow employees to view "all staffs" or "own" leaves.
-  Allow apply other staff leave (Requires staff holiday function): You can choose to allow employees to apply for "all staffs" or "own" leave.
-  Allow view all staff salary details (Requires payroll function): You can choose to allow employees to view the salary details of "All staffs" or "Own".

Point of sale authority (Override point of sale setup authority)

Allow edit or void invoice (Before cash closing) Yes, user can edit or void all invoice (Before cash closing) ▼

Staff authority

Allow edit past shift No ▼ [Only for Staff > Staff > Leave / Rest days]

-  Allow edit or void invoice (Before cash closing): Whether the user can edit or void the invoice after complete cash closing, select "Yes" if possible.
-  Allow edit past shift : If the user can edit the past shift, select "Yes".

Sales

Sales group Sales ▼ Notes : Sales at same group will receive same commission scheme

View all sales invoice rights Can view all sales invoice

-  Sales group : Select the sales group, the system will calculate the commission and sales analysis based on the group.
-  View all sale invoice rights : If the employee identity includes "sales" and "user", tick the box to allow the employee to view all sales Invoices.

Therapist

Therapist group Doctor ▼ Notes : Therapist at same group will receive same wages scheme

Therapist department BODY
 Doctor

-  Therapist group: Select the right group for therapist, the system will calculate wages based on the group.
-  Therapist department: According to the skills of the therapist, select department. Employee is allowed to have multiple departments at the same time.

Shift

Weekday	Shift
Sunday	A (10:00 am - 10:00 pm) ▼
Monday	A (10:00 am - 10:00 pm) ▼
Tuesday	A (10:00 am - 10:00 pm) ▼
Wednesday	A (10:00 am - 10:00 pm) ▼
Thursday	A (10:00 am - 10:00 pm) ▼
Friday	A (10:00 am - 10:00 pm) ▼
Saturday	A (10:00 am - 10:00 pm) ▼

-  Shift: Preset shift and holidays to employees. The system will have related reports to view the attendance records of employees. The shift of the therapist will be reflected in the therapist table.

Click <submit> to add staff.




Staff search

Go to Staff > Staff > Search

Staff search	
Staff code	<input type="text"/>
Staff name	<input type="text"/>
Telephone	<input type="text"/>
Remark	<input type="text"/>
Default shop	<div style="border: 1px solid black; padding: 2px;"> All Central CVWB MK TST </div>
Staff status	Existing staff
Staff type	<input checked="" type="checkbox"/> User <input checked="" type="checkbox"/> Sales <input checked="" type="checkbox"/> Therapist
User access group	<div style="border: 1px solid black; padding: 2px;"> All Account Department Admin Logistic Department Marketing Department </div> Active user
Sales group	<div style="border: 1px solid black; padding: 2px;"> All Sales Sales Manager Sales Trainee </div>
Sales group	<div style="border: 1px solid black; padding: 2px;"> All Therapist Senior Therapist Junior Therapist Doctor </div>
Join date	<input type="text"/>
Last day	<input type="text"/>
Sorted By	Shop
<input type="button" value="Submit"/> <input type="button" value="Reset"/>	

Users can search for active, inactive, or deleted staff.

Select the appropriate search criteria , Click <submit> to search.

Edit Staff

Go to Staff > Staff > Select Shop > Select Staff > Edit

[Back](#) | [View](#) | [Edit](#) | [Leave / Rest days](#) | [Password](#) | [Inactive](#) | [Delete](#) | [View commission rights](#) | [View therapist rights](#) | [Approve leave right](#) | [Leave email notification right](#)

Edit staff	
Staff code *** must input	<input type="text" value="S003"/> <small>(Maximum 15 characters, please avoid input ', !, @, \$, #, %, ^, &, *, space.) [If the staff is a user, staff login= staff code.]</small>
Default shop *** must input	<input type="text" value="Central"/>
Staff name *** must input	<input type="text" value="Lee"/> <small>(Maximum 100 characters)</small>
English full name	<input type="text"/> <small>(Maximum 100 characters)</small>
Chinese full name	<input type="text"/>
Gender	<input type="text" value="F"/>

Click<Edit> , edit staff information.

Arrange leave/ rest day and working hours for staff

The work schedule will be arranged according to the preset shift in the staff master.

Users can click the arrow or directly select the month to update working hours and leave.

Go to Staff > Staff > Select Shop > Select staff > Leave/ Rest days

Back | View | Edit | **Leave / Rest days** | Password | Inactive | Delete | View commission rights | View therapist rights | Approve leave right | Leave email notification right

Arrange statutory holidays or public holidays for employees.
 Click <H>, the system will change holiday type to "Public Holiday".
 Click <H> again to restore the settings.

Setup Vikki leave / rest days and working hours

July, 2020

This month statutory holiday: **H**
 1-Jul-2020 Hong Kong Special Administrative Region Establishment Day
 Arranged count / Statutory count : 0 / 1 days
 This year arranged count / This year statutory count : 0 / 8 days

This month public holiday: **H**
 1-Jul-2020 Hong Kong Special Administrative Region Establishment Day
 Arranged count / Public holiday count : 0 / 1 days
 This year arranged count / This year public holiday count : 0 / 12 days

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 A		3 A 10:00 am-10:00 pm	4 A 10:00 am-10:00 pm
5 A 10:00 am-10:00 pm	6 A 10:00 am-10:00 pm	7 A	10:00 am-10:00 pm	10:00 am-10:00 pm	10 A 10:00 am-10:00 pm	11 A 10:00 am-10:00 pm
12 A 10:00 am-10:00 pm	13 Day-off +	19 A 10:00 am-10:00 pm	20 Day-off +	21 A 10:00 am-10:00 pm	22 A 10:00 am-10:00 pm	23 A 10:00 am-10:00 pm
24 A 10:00 am-10:00 pm	25 A 10:00 am-10:00 pm	26 B 10:00 am-01:00 pm	31 A m-10:00 pm			

Print Vikki schedule

2020 July

- Working day : Black colour
- Leave / rest days : Red colour
- Press date change colour
- Press working hours change working hours

Click <date> to select the type of leave and arrange leave for employees.

Click <Cross> to cancel the holiday.
 Click <Blue Plus Sign> to add multiple holiday types on the same day.

Click <working period> to allocate other working hours for employees.

Click <Print> for employee to view their timetable.

Set Approve Leave Right and receive leave notification staff

Staff can apply leave through b2b system. After the application, system will send the leave application email to the applicant, approve staff and other related staff.

Setup Approve leave right

Staff > Staff > Select shop > Select staff > Edit > Approve leave and receive leave email notification

Select approvers who can approve this staff's leave, press <Add>.

Approve leave and receive leave email notification

Following selected staff can approve Ivy Lee (beauty) 's leave(Any one can complete approve) and can receive Ivy Lee (beauty) 's leave email notification

CWB Amy (S007) Add

Joan (S005)
Gary (S002)

Remove

Setup Approve leave right and receive leave email notification staff

Select staff that can receive this staff's leave email notification, press <Add>.

Receive leave email notification

Following selected staff can receive Ivy Lee (beauty) 's leave email notification

CWB All Add

Amy (S007)

Remove

Press <Submit> to save.

Submit Reset Cancel

As approver, setup staff for approval

Staff> Staff> Select shop> Select staff > Approve leave right

Back | View | Edit | Leave / Rest days | Password | Inactive | Delete | View commission rights | View therapist rights | **Approve leave right** | Leave email notification right

Ticked represent staff for leave approval.

Staff code, Staff name and [Can approve leave and receive leave email notification] keyword Input keyword and press [Enter] will filter following list

Ivy Lee (beauty) can approve following selected staff's leave and receive their leave email notification

Shop	Identity	User access group	Staff code	Staff name	Select UnSelect All	Can approve leave and receive leave email notification
CWB	User, Sales, Therapist	Admin	S001	Vikki	<input checked="" type="checkbox"/>	Anna Tsui (Anna) - no email Ivy Lee (beauty) - ivy@123.com Lisa (S006) - lisa@123.com Joan (S005) - no email Gary (S002) - gary@123.com

> Display all

Press <Display All> to display all staff.

Allow input member code, member name or keywords to search staff.

Staff code, Staff name and [Can approve leave and receive leave email notification] keyword Input keyword and press [Enter] will filter following list

Ivy Lee (beauty) can approve following selected staff's leave and receive their leave email notification

Shop	Identity	User access group	Staff code	Staff name	Select Select All	Can approve leave and receive leave email notification
CWB				Vikki	<input checked="" type="checkbox"/>	Anna Tsui (Anna) - no email Lisa (S006) - lisa@123.com Joan (S005) - no email Gary (S002) - gary@123.com
CWB				Gary	<input checked="" type="checkbox"/>	Anna Tsui (Anna) - no email Gary (S002) - gary@123.com
CWB	User, Sales, Therapist	Admin	S005	Joan	<input type="checkbox"/>	Anna Tsui (Anna) - no email Lisa (S006) - lisa@123.com Gary (S002) - gary@123.com

Or filter by clicking the < Magnifier> of shop, identity and user access group.

Tick to select staff for leave approval

Staff code, Staff name and [Can approve leave and receive leave email notification] keyword

Ivy Lee (beauty) can approve following selected staff's leave and receive their leave email notification

Shop	Identity	User access group	Staff code	Staff name	Select UnSelect All	Can approve leave and receive leave email notification
CWB	User	Account Department	Anna	Anna Tsui	<input checked="" type="checkbox"/>	Anna Tsui (Anna) - no email Ivy Lee (beauty) - ivy@123.com Joan (S005) - no email Gary (S002) - gary@123.com
CWB	User, Sales, Therapist	Admin	S001	Vikki	<input checked="" type="checkbox"/>	Anna Tsui (Anna) - no email Ivy Lee (beauty) - ivy@123.com Lisa (S006) - lisa@123.com Joan (S005) - no email Gary (S002) - gary@123.com

Indicate Ivy can approve Vikki's leave application.

> Display all

Setup Leave email notification right

Staff> Staff> Select shop> Select Staff > leave email notification right

[Back](#) | [View](#) | [Edit](#) | [Leave / Rest days](#) | [Password](#) | [Inactive](#) | [Delete](#) | [View commission rights](#) | [View therapist rights](#) | [Approve leave right](#) | [Leave email notification right](#)

Ticked staff represent when they apply for leave, this staff will receive email notification.

The system will display other staff and emails that need to be notified when the employee Joan applies for a leave.

Staff code, Staff name and email notification to keyword Input keyword and press [Enter] will filter following list

Ivy Lee (beauty) can receive following selected staff's leave email notification						
Shop	Identity	User access group	Staff code	Staff name	Select Unselect All	Email notification to
CWB	User, Sales, Therapist	Admin	S002	Gary	<input checked="" type="checkbox"/>	Ivy Lee (beauty) - ivy@123.com
CWB	User, Sales, Therapist	Admin	S005	Joan	<input checked="" type="checkbox"/>	Ivy Lee (beauty) - ivy@123.com Lisa (S006) - lisa@123.com
CWB	Therapist		S009	Terry	<input checked="" type="checkbox"/>	Ivy Lee (beauty) - ivy@123.com

Can press <Display all>, input keywords or filter and then select appropriate staff.
 When staff apply leave Ivy will receive email notification.

> Display all

Reset user login password

Go to Staff > Staff > Select Shop > Select staff > Password

Back | View | Edit | Leave / Rest days | **Password** | Inactive | Delete | View commission rights | View therapist rights | Approve leave right | Leave email notification right

Change password

Staff code	beauty
Password	<input type="text" value="Generate random password"/> <input type="text"/> <small>(6-15 characters)</small>
Confirm password	<input type="text"/>

Click <submit> to save new password.

Directly enter the new password, or press <Generate random password>, the system will assign a new password.

Inactive/ Delete staff

Go to Staff > Staff > Select Shop > Select staff > Inactive/ delete

Back | View | Edit | Leave / Rest days | Password | **Inactive** | **Delete** | View commission rights | View therapist rights | Approve leave right | Leave email notification right

Click <Inactive> to suspend the employee.

Sometimes employees may leave for a long period of time, which they cannot log in to the system to work. You can suspend employees so that even employees with correct login password cannot log in to the system to work.

Inactive employees can be converted to <Active>.

Click <Delete> to delete the employee.

Employees can be deleted when they resign.

Deleted employees can <Undo (Del)>.

CWB staff list					
Staff code	Staff name	User	Sales	Therapist	Action
RayMan (Deleted)	RayMan (Deleted)	✓	✓	✓	<input type="button" value="Inactive"/> <input type="button" value="Undo (Del)"/>
S007 (Inactive)	Joe	✓	✓	✓	<input type="button" value="Active"/> <input type="button" value="Delete"/>

The system will keep records of Inactive/deleted employees.

Set up the sequence to be displayed at therapist table

Go to Staff > Therapist

Select shop, the system will display all therapists in the shop.

Shop

Therapist list			
Sequence to be displayed at therapist table	Therapist code	Therapist name to be displayed at therapist table	Shop
<input type="text" value="1"/>	S009	Terry	CWB
<input type="text" value="2"/>	beauty	Ivy Lee	CWB
<input type="text" value="3"/>	S001	Vikki	CWB
<input type="text" value="4"/>	S002	Gary	CWB

The user enters the order of the therapist in the list, and presses <Enter>. The system will instantly update the sequence to be displayed at therapist table.

Time	<u>A</u> Terry	<u>A</u> Ivy Lee	<u>A</u> Vikki	<u>D</u> Gary
08:30 am				
08:45 am				
09:00 am				