

Staff setup

The identities of employees in the system include user, sales and therapist.

The user has a login password to log in to the system.

After the sale successfully sells the product, the sales and commissions will be recorded.

After the therapist completes the care for the member, the work and wages will be recorded.

Each identity can be classified by group.

Setup user access group

Go to Staff > Setup > User access group

If the system has only one user or company allow all users for all functions, user access group setup can be skipped.

Users of same rights should be in the same access group.

Setup the user access group, set up the rights in the group and then adding users to the group.

User access group 'admin' which own all available rights is default in the system.

We will add user permission groups first, then set permissions for the group, and then add employees to the group.

User access group

****If system have only one user or company allow all users for all functions, user access group setup can be skipped.****
 Users of same rights should be in the same access group.
 Setup the user access group, set up the rights in the group and then adding users to the group.
 User access group 'admin' which own all available rights is default in the system.

<u>User access group</u>	<u>User count</u>
Account Department Rename	3
Admin Rename	12

Back New
Click <New>, add new user access group.
Close

New user access group

User access group

Submit
Reset
Cancel

Enter the name. Click <Submit> to add new group.

We can select the appropriate permissions to groups according to the four access level in the system.

User group rights						
First access level : Master						
Second access level	Third access level	Fourth access level	Account Department	Admin	Logistic Department	
<input type="checkbox"/> Shop Setup Select	<input type="checkbox"/> List Shop	<input type="checkbox"/> Edit <input type="checkbox"/> View	<input type="checkbox"/> - <input type="checkbox"/> -	<input type="checkbox"/> - <input checked="" type="checkbox"/> Granted	<input type="checkbox"/> - <input checked="" type="checkbox"/> Granted	
<input type="checkbox"/> Equipment Setup Select	<input type="checkbox"/> List Equipment	<input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Delete	<input type="checkbox"/> - <input type="checkbox"/> -	<input checked="" type="checkbox"/> Granted <input checked="" type="checkbox"/> Granted	<input checked="" type="checkbox"/> Granted <input checked="" type="checkbox"/> Granted	

Check the appropriate box for the group and give the group permission. And so on, until the authority is completed.

User group rights						
First access level : Master						
Second access level	Third access level	Fourth access level	Account Department	Admin	Logistic Department	
<input type="checkbox"/> Shop Setup Select	<input type="checkbox"/> List Shop	<input type="checkbox"/> Edit <input type="checkbox"/> View	<input type="checkbox"/> - <input type="checkbox"/> -	<input type="checkbox"/> - <input checked="" type="checkbox"/> Granted	<input type="checkbox"/> - <input checked="" type="checkbox"/> Granted	
<input type="checkbox"/> Equipment Setup Select	<input type="checkbox"/> List Equipment	<input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Delete	<input type="checkbox"/> - <input type="checkbox"/> -	<input checked="" type="checkbox"/> Granted <input checked="" type="checkbox"/> Granted	<input checked="" type="checkbox"/> Granted <input checked="" type="checkbox"/> Granted	

Press <Select>, select to view individual groups only.

User group rights						
First access level : Master						
Second access level	Third access level	Fourth access level	Account Department	Admin	Logistic Department	
<input type="checkbox"/> Shop Setup Select	<input type="checkbox"/> List Shop	<input type="checkbox"/> Edit <input type="checkbox"/> View	<input type="checkbox"/> - <input type="checkbox"/> -	<input type="checkbox"/> - <input checked="" type="checkbox"/> Granted	<input type="checkbox"/> - <input checked="" type="checkbox"/> Granted	
<input type="checkbox"/> Equipment Setup Select	<input type="checkbox"/> List Equipment	<input type="checkbox"/> Edit <input type="checkbox"/> Delete	<input type="checkbox"/> - <input type="checkbox"/> -	<input checked="" type="checkbox"/> Granted <input checked="" type="checkbox"/> Granted	<input checked="" type="checkbox"/> Granted <input checked="" type="checkbox"/> Granted	

Press <Select>, select to view second access level only.

Setup sales group

Go to Staff > Setup > Sales group

Sales group is setup for commission calculation and sales analysis purpose.

Sales with the same commission scheme should be assigned into the same sales group.

If both commission and sales analysis are not required, sales group setup can be skipped.

Sales group 'sales' is default in the system. Setup sales group and then assign sales to the sales group.

When it comes to commissions, everyone has different calculation methods.

For example, calculated based on item, calculated by BAR or different item have different commissions, these can be handled by HKB2B. The group commission is default, editing or deleting is allowed.

Sales group
Sales group is setup for commission calculation and sales analysis purpose.
Sales with the same commission scheme should be assigned into the same sales group.
Setup sales group and then assign sales to the sales group at Staff > Staff.
Sales group 'sales' is default in the system.
****If both commission and sales analysis are not required, untick Point of sale > setup > Invoice item display > Item sales, sales is not required to input in the invoice and sales group is also not required.****

Sales group	Description	Sales count
Sales	Sales	6

Back **New** Click <New>, add new sales group. Close

New sales group

Sales group name: Sales Trainee Enter name and description.

Sales group description: Sales Trainee

Default commission: 10 % The default commission can be selected as a fixed amount or calculated as a percentage.

Click <Submit> to add new group. **Submit** Reset Cancel

Setup therapist group

Go to Staff > Setup > Therapist group

Therapist group is setup for wages calculation purpose.

Therapist with the same wages scheme should be assigned into the same therapist group.

If wages calculation is not required, therapist group setup can be skipped.

Therapist group 'Therapist' is default in the system.

Setup therapist group and then assign therapist to the therapist group.

When it comes to wages, everyone has different calculation methods.

For example, calculated base on item, calculated by BAR or different item have different wages, these can be handled by HKB2B. The group wages is default. Editing or deleting is allowed.

Therapist group

Therapist group is setup for wages calculation purpose.
Therapist with the same wages scheme should be assigned into the same therapist group.
Setup therapist group and then assign therapist to the therapist group at Staff > Staff.
Therapist group 'Therapist' is default in the system.

Therapist group name	Therapist group description	Therapist count
Therapist	Therapist	4

Back
New

Click <New>, add new therapist group.

Close

New therapist group

Therapist group name	<input type="text" value="Senior Therapist"/> <div style="border: 1px solid #ccc; background-color: #f0e6ff; padding: 2px; display: inline-block;">Enter name and description.</div>
Therapist group description	<input type="text" value="Senior Therapist"/>
Default wages	<input type="text" value="\$"/> <div style="border: 2px solid red; padding: 2px;">v</div> <div style="border: 1px solid #ccc; background-color: #f0e6ff; padding: 5px; display: inline-block; margin-top: 5px;">The default wages can be selected as a fixed amount, calculated as a percentage or fraction.</div>

Click <Submit> to add new group.

Submit
Reset
Cancel

Setup therapist department

Go to Staff > Setup > Therapist department

Therapist department can use to filter therapist at therapist table.

Therapist with the same function should be assigned into the same therapist department.

Setup therapist department and then assign therapist to the therapist department.

Therapist can be assigned for more than 1 therapist department

Therapist department 'Facial' is default in the system.

Scheduled department cannot be deleted.

Therapist department

Therapist department can use to filter therapist at therapist table.
Therapist with the same function should be assigned into the same therapist department.
Setup therapist department and then assign therapist to the therapist department at Staff > Staff.
Therapist can be assigned for more than 1 therapist department
Therapist department 'Facial' is default in the system.

Therapist department name	Therapist department description	Therapist count	Action
FACIAL	Facial Treatment	8	Edit
HAND	Hand Treatment	0	Edit Delete

New therapist department

Therapist department name

Therapist department description

Enter name and description.

Click <Submit> to add new department.



Go to Booking > Therapist table

The table will only show the therapist in the designated department.

7-Sep-2020, Monday Shop Dept. Table Display New Member

Shop CWB Member

R A F SEND M T B Book My Account Campaign History Installment Details Document R Int. Current time:2:30:56pm

Therapist department FACIAL

Time	A Ivy Lee	Unspecified
08:30 am		
08:45 am		
09:00 am		
09:15 am		
09:30 am		

Setup staff shift

Go to Staff > Setup > Shift

The system can also record the employees' working hours.

Preset shifts and holidays, and then allocate shifts to individual employees.

Shift for therapist will reflect at booking tables.

System default shift 'A' for setup convenience.

Shift list

Shift is setup for therapist, it will reflect appropriate working hours at booking tables.
Setup shift first and then setup therapist shift at individual staff account.
System default one shift 'A' for setup convenience.

Shift	Start time	End time	Meal breaks	Action
A (A)	10:00 am	10:00 pm	Include meal breaks	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

New shift

Name	<input type="text"/>	(Maximum 50 characters)
Code	<input type="text"/>	(Maximum 10 characters)
Start time	<input type="text" value="09:00 am"/>	Enter name, code, start time and end time.
End time	<input type="text" value="06:00 pm"/>	
Not include meal breaks	<input checked="" type="checkbox"/>	If the shift does not include meal breaks, tick the box.

Click <Submit> to add new shift.





Setup staffs' Leave/ Rest days

Go to Staff > Setup > Leave/ Rest days type

The type of leave that has been scheduled cannot be deleted.

Leave / Rest days type					
Leave / Rest days is setup for therapist, it will reflect holiday at booking tables. Setup Leave / Rest days first and then setup therapist holiday.					
Leave / Rest days type	Code	Properties	Only for apply leave	Action	
Annual Leave	AL	Rest days with pay, deduct annual leave	No	Edit	
Day-off	DO	Rest days with pay, not deduct annual leave	No	Edit	
Sick Leave	SL	Rest days without pay	Yes	Edit	Delete

New leave / rest days type	
Leave / Rest days type	<input type="text"/> (Maximum 50 characters)
Code	<input type="text"/> (Maximum 10 characters)
Deductions	<input type="radio"/> Rest days with pay, deduct annual leave <input checked="" type="radio"/> Rest days with pay, not deduct annual leave <input type="radio"/> Rest days with 4/5 pay, not deduct annual leave <input type="radio"/> Rest days without pay <input type="radio"/> No pay in probation period <input type="radio"/> Deduct compensate leave <input type="radio"/> Statutory holiday (Statutory holiday only for 1 leave / rest days type) <input type="radio"/> Public holiday
Increase	<input type="checkbox"/> Increase annual leave <input type="checkbox"/> Increase compensate leave
Only for apply leave	<input type="checkbox"/> Yes

Enter leave type and code. Select appropriate deductions according to the holiday type.

Users can increase annual leave/compensate leave for staff through application and approval.

Tick <Yes>, users cannot directly arrange this type of holiday to staff, and must pass the application and approval.



Click <Submit> to save.

Setup Statutory holiday and Public holiday

HKB2B will update automatically according to Hong Kong's statutory holidays and public holidays.

Therefore, Hong Kong users do not need to setup holidays.

However, users outside the Hong Kong region need to set and update their own holiday according to the region.

Go to Staff > Setup > Statutory holiday/ Public holiday

The settings for public holidays and statutory holidays are the same.

Statutory holiday list System default Hong Kong Statutory holiday

<u>Date</u>	<u>Chinese name</u>	<u>English name</u>	<u>Action</u>
1-Jan-2021	一月一日	The first day of January	Edit Delete
12-Feb-2021	農曆年初一	Lunar New Year's Day	Edit Delete

New statutory holiday

Date : / /

Chinese name :

English name :

Enter date, Chinese name and English name.

Click <Submit> to add new holiday.

