

## Employees

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## Employee File

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M-AE File: Management: Employees: Edit employee

You may edit employee information or change the password for security reasons. There is also a tab for Notes for any comments you choose to write regarding the employee.

### -- Employee Detail (tab) --

**Name** - Full name of employee, First name, Last Name.

**Sales ID** - A unique code of up to 3 characters in length. This can be any combination of letters and numbers. It is frequently the initials of an employee. If security is not a major issue, it could be just one character to speed up entry into PFW.

**Address** - This will be used for internal purposes only. It can be a handy reference.

**City, State, Zip**

**Phone**

**Invoice Name** - This entry will be printed on the customer invoice. For privacy reasons, you may choose to print only the first name or an employee number on invoices.

**Social Security #** - Again, this will be used for internal purposes only. It can be a handy reference.

**Security Group** - Apply pre-set security and access privileges for the employee by choosing from one of the groups. If you select Unassigned then full access is granted to the employee and another tab is added for setting up individual security options. Note: Security Groups are defined under File: [Definitions](#).

**Active** - If this is **unchecked**, then the employee will have no rights to PFW.

-- **Change Password (button)** --

**Password** - A code of up to 6 characters using any combination of letters and numbers. This code should remain confidential. If security is a major issue, it can be changed as often as needed. As you type, the code characters will only be displayed as asterisks.

**Confirm Password** - Re-enter the password to verify that the original entry is correct. As you type, the code characters will only be displayed as asterisks.

**Print [F7] (button)** - Will print the name and address of the employee along with any notes on the Notes tab.

-- **Options (tab)** --

**Assigned Register #** - Should be set to 0 except for special use cases. If you have a number of cashiers and wish to track transactions more closely, you can assign a permanent cash drawer number to that employee. Whenever the employee logs-in, the Station number you assign here becomes active.

Note: All Station settings apply so printers and cash drawer settings need to be identical or accessible in the same way at all stations to be used by the employee. Advance Setup: You need to create a station number for each employee. Then assign the station number at this screen. Operations:

**Service Tech** - If this employee will be serving as a service technician at times, then this box should be **checked**. The employee will then be included in the Service Order module and will be listed within the Service Scheduler.

*Requires Module: Service* - If service work is not part of your business, then this option will be invisible.

**How To Activate Settings For Employee E-Mail**

The following must be filled in to allow the employee to send e-mail and work with Internet orders.. See ([E-Mail From PFW](#))

Fill in the fields with the appropriate links. You **MUST** have a functional e-mail program and connection to the internet. If you are using Outlook Express, for example, or some other e-mail program, you can refer to the setup options in that program to get the information needed here.

**POP3 Server** - (Post Office Protocol) the e-mail server you log into to check and receive your e-mail.

**POP Server User Name** - your e-mail account name

**Password** - your e-mail account password

**Delete Messages On Server** -

**SMTP Server** -

**Return E-Mail Address** -

-- **Groups (tab)** --

Groups are for internal classification of employees by job or location or team assignments. These groups are utilized for internal mailings and reports.

**All Groups** - A listing of defined groups. You may not add any here. Go to File: [Mail Groups](#) to edit or add groups.

**Groups Belonged To** - Groups to which this employee is currently assigned.

To change assignments, highlight the name of a group in the All Groups list and press the transfer button to copy the name of the group into the Groups Belonged To list. Repeat as needed.

-- **Security (tab)** --

Note: This tab is only visible when the employee is assigned to the UNASSIGNED security group on the Employee Detail tab.

**Security** - A list of settings for each Module can be individually customized for an employee. Because there are so many options relevant to security see [List Of Security Options](#) for details.

By default, all settings are turned on, giving a new employee access to all features and functions of PFW.

Turn off any settings as desired. Be sure to review additional settings not visible in the window by scrolling down.

Select each Module in turn.

- Register - settings relating to sales
- Manager - settings relating to management and general PFW setups
- Inventory - settings related to inventory control

Clicking on a setting in the Description box will alternately check or uncheck the highlighted setting.

#### -- Notes (tab) --

You may keep multiple notes about the employee.

**Date** - Date of note creation

**Time** - Time of note creation

**Description** - Type of note

**Add - Delete** a note To **Edit** a note, simply highlight the note and type in the fields.

**Note** - Contents of note

## Employee List

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M-AE File: Management: Employees

You should add your employees to this list to enhance accountability and initiate program security. When PFW is first installed, only one employee is included to allow you access to the program for setup and experimentation.

### Benefits

If your business is a one-man operation, you could still benefit from entering your own name.

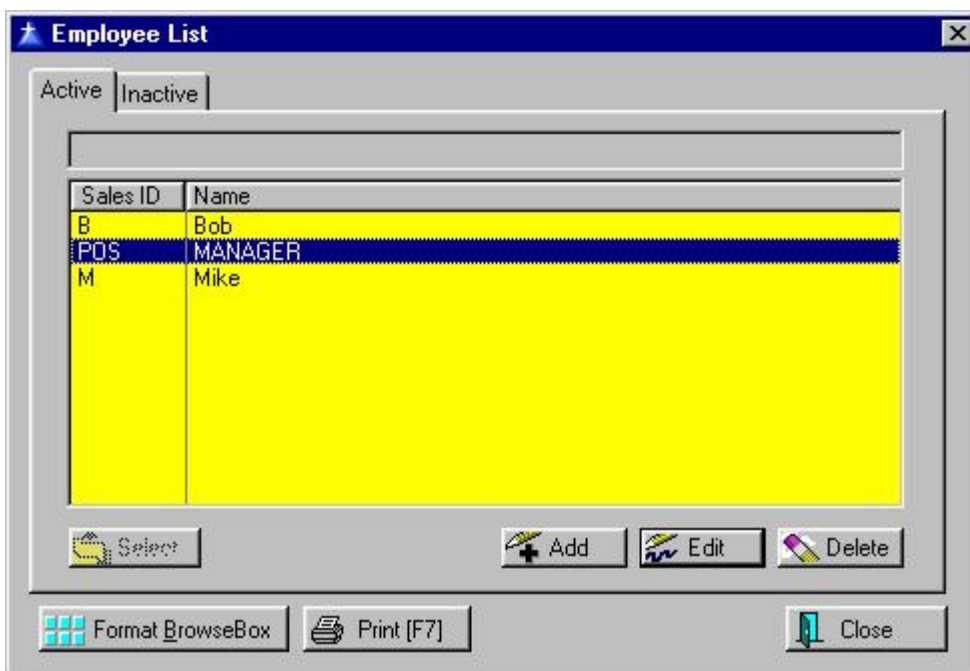
- You can personalize your invoices with your own name or initials as the sales person rather than the title of manager.
- You can shorten your ID and Password to just one letter, making entry easier.

If you have other employees, there are additional benefits.

- You can enhance accountability. Key activities such as making sales, receiving inventory, balancing the register, can always be traced back to the individual who logged in.
- You can restrict access for some employees to selected areas and limit rights to perform some of PFW's transactions.
- You will have a handy list of employee names and addresses.
- You can leave 'e-mail' messages globally for all employees, selected groups of employees, or individual employees.

### Security

While editing or adding an employee, you will be presented with many options relevant to security. See [List Of Security Options](#) for details.



### Active - Inactive

An active employee has current rights to PFW. An inactive employee has been temporarily removed from PFW's rights in anticipation of the employee returning to work at some future time. By editing an employee, you can choose to make that employee active or inactive.

**Add** - This button will launch PFW's New Employee Wizard to make it easy to fill in all necessary fields.

**Edit** - Change an employee's information and or security rights.

**Delete** - Remove a sales person.

TIP: Rather than deleting an employee, just change the security options. Deleting an employee could exclude sales made by that employee from specialized reports. Generally, if you ask for a report on ALL employees, even transactions of deleted employees will be included.

The **Select** button will be active only when appropriate to the task.

**Print [F7]** - You may choose to print the list of employees which will include names, addresses and phone numbers. Or you may print the records for the highlighted employee. These records include all notes kept about the employee.

### Format BrowseBox

You may make some adjustments to this display. There are five fields which may be displayed simultaneously. You can also arrange the order of the information.

- Sales ID
- Employee Name
- Employee Address
- Home Phone
- Sales Number

Selecting the Default button will restore the original settings.

## Password

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PFW is password protected to assure that only authorized individuals use the program or portions of the program.



Often you will be prompted to **Enter your Sales ID**. The letters POS are used for the Sales ID and also for the Password POS for first time users of PFW.

After you have successfully installed and setup PFW, it is recommended that you change the password of the POS Sales ID to something of your own choosing.

You may want to change your passwords on a regular basis to minimize misuse of your ID.

Be sure to keep a record of all your new primary Sales ID's and Passwords.

## Employee Time Cards

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M-AE ACCESS: Shift F11 (Shortcut)

Employees may clock in and out of PFW. Their hours are recorded for management to review and print.

To clock in or out, the employee selects the Clock [F11] from the toolbar icons.

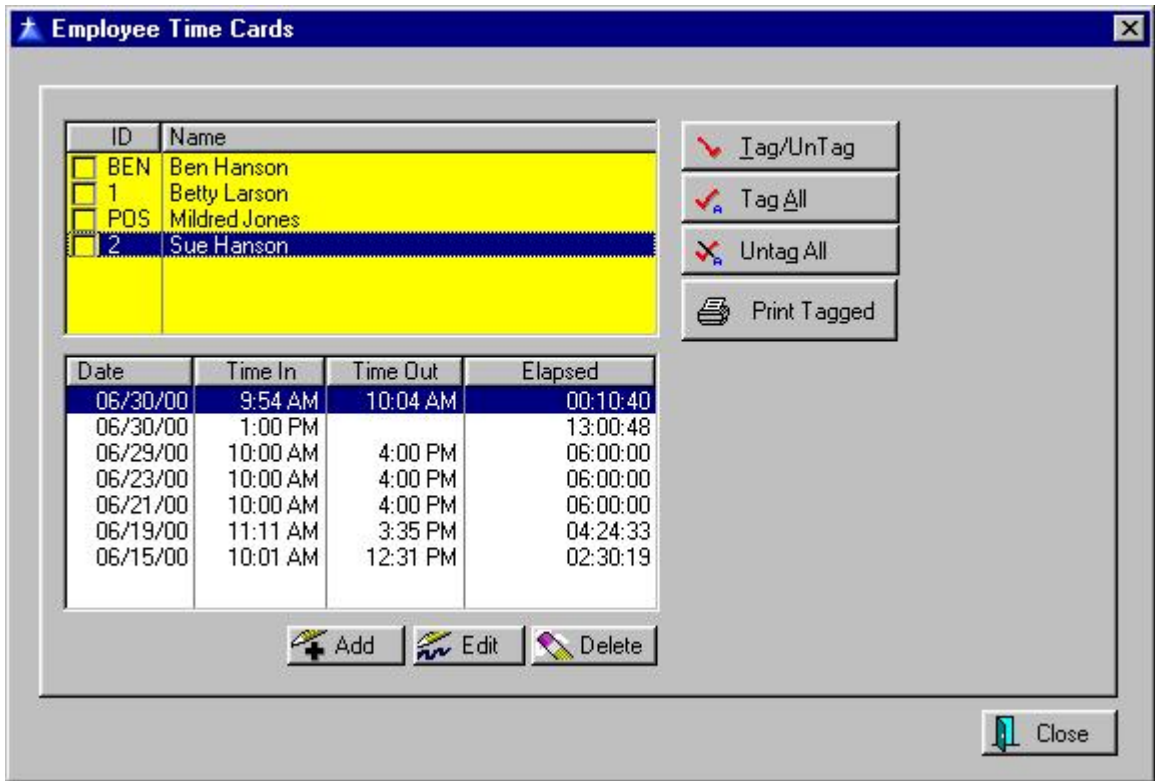


After entering his SalesID and Password, he can choose to Clock In [F6] or Clock Out [F9].





The manager can review employee records by going to Management: Employee Time Cards.



A printed report of an employee's hours looks like this.

**Employee Time Report**  
*Confidential*

The Fine Art House From: 6/01/00  
To: 6/30/00

Employee	Date	Time In	Time Out	Hours
<hr/>				
Sue Hanson				
	6/15/00	10:01 AM	12:31 PM	02:30:19
	6/19/00	11:11 AM	3:35 PM	04:24:33
	6/21/00	10:00 AM	4:00 PM	06:00:00
	6/23/00	10:00 AM	4:00 PM	06:00:00
	6/29/00	10:00 AM	4:00 PM	06:00:00
	6/30/00	9:54 AM	10:04 AM	00:10:40
	6/30/00	1:00 PM		- Not Clocked Out
				0025:05:34