

# Set Employee parameters (Set contracted hours and PO creation accessibility)

Once a user has been created you can set various Employee settings that manage employee behaviour.

## Employees

The screenshot shows the SUITECRM DASHBOARD interface. The top navigation bar includes links for SCHEDULER, STOCK & EQUIPMENT, CRM, CONFIGURATION, VEHICLES, and ALL. The left sidebar contains various modules like Timeline Diary, Grid Diary, Export Payroll Data, Vehicle Tracker, Export P&L Report, Job Meeting & Invoice report, and Employee Day View. The main content area displays the SUITECRM DASHBOARD with sections for JOTPAD, MY OPEN TASKS, MY SITE SURVEY, MY QUOTES, and MY SURVEYS. A red arrow points to the 'Employees' link in the top right navigation bar.

Num	Name	Quote Stage	Grand Total	Valid Until
22559	Quote-Demo quote job-14042024	Customer Accepted Quote	£120.00	
22558	Slolar quote	Customer Accepted Quote	£720.00	
22557	Bathroom Fitout	Customer Accepted Quote	£720.00	
22556	Quotedemo	Quote in Creation	£1,140.00	
22555	Quote-Hotel furniture fix-26032024	Quote sent for authorisation	£3,720.00	

## Select the Employee to set/update

The screenshot shows the EMPLOYEES page in SUITECRM. The top navigation bar includes links for EMPLOYEES, SCHEDULER, STOCK & EQUIPMENT, CRM, CONFIGURATION, VEHICLES, and ALL. The left sidebar contains various modules like Create Employee, View Employees, Timeline Diary, Grid Diary, Export Payroll Data, Vehicle Tracker, Export P&L Report, Job Meeting & Invoice report, and Employee Day View. The main content area displays the employee profile for 'ZACH DEMO'. A red arrow points to the 'Edit' button in the ACTIONS menu.

Field	Value
Active	Active
Name	Zach
Job Title	Apprentice
Department	Engineer
Reports to	Darren demo
Home Phone	
IM Type	
Description	
Primary Address	9, Station Road, Portishead, Bristol
State/Region	
Address Country	
Email Address	weston_lamb35@mail.com (Primary)
Last Name	demo
Work Phone	01179 519020
Mobile	
Other Phone	
Fax	
IM Name	
City	
Postal Code	BS20 7DB

# Set the contracted hours.

This is important when determining overtime worked if you track hours.

Create Employee

View Employees

Timeline Diary

Grid Diary

Export Payroll Data

Vehicle Tracker

Export P&L Report

Job Meeting & Invoice report

Employee Day View

JOB STATUS

COLOUR

Pending

Survey Booked

Survey Completed

Quote Sent for Authorisation

Quote Accepted

Job Raised (Booked)

Job In-Progress

Job Completed

Job Completed with Issues

Invoice Raised

Job Closed (Invoice Paid)

EMPLOYEES

SCHEDULER

STOCK & EQUIPMENT

CRM

CONFIGURATION

VEHICLES

ALL

Diary

Jobs

Search...

CONTRACTED HOURS

Monday (Contracted Hours):

8.0

Tuesday (Contracted Hours):

8.0

Wednesday (Contracted Hours):

8.0

Thursday (Contracted Hours):

8.0

Friday (Contracted Hours):

8.0

Saturday (Contracted Hours):

0.0

Sunday (Contracted Hours):

0.0

Weekly Contracted Hours:

40.00

Charge-Out Rate:

40.00

Set the contracted hours

JOB STATUS

Job Status:

Available

SAGE PROJECT COST CODE

# PO creating settings

Create Employee

View Employees

Timeline Diary

Grid Diary

Export Payroll Data

Vehicle Tracker

Export P&L Report

Job Meeting & Invoice report

Employee Day View

JOB STATUS

COLOUR

Pending

Survey Booked

Survey Completed

Quote Sent for Authorisation

Quote Accepted

Job Raised (Booked)

Job In-Progress

Job Completed

Job Completed with Issues

Invoice Raised

Job Closed (Invoice Paid)

EMPLOYEES

SCHEDULER

STOCK & EQUIPMENT

CRM

CONFIGURATION

VEHICLES

ALL

Diary

Jobs

Search...

Mobile App Version Number:

4.1790

Last date Android Version Recorded:

05-01-2024

PO RESTRICTION TIMINGS

Employee is unable to create a PO on these days:

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Restricted from (e.g.0700):

Restriction ends (e.g 1900):

Set when the user can create a PO

DEFAULT EMAIL TEMPLATE

Default Invoice Template:

CRM AUDIT

Created By:

SAVE

CANCEL

SAVE AND CONTINUE

Revision #2

Created 14 April 2024 12:43:58 by RakataTech

Updated 21 April 2024 07:14:39 by RakataTech