User Guide

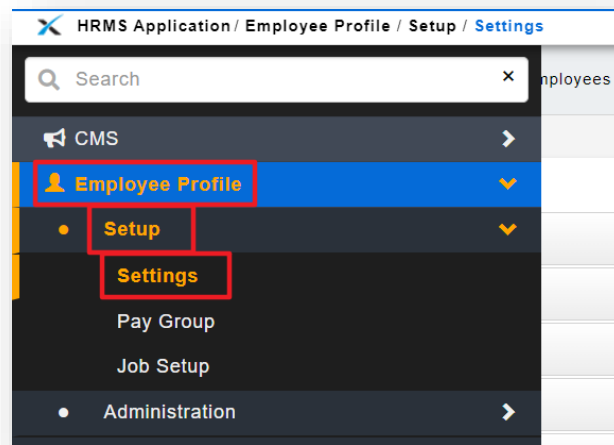## Customize Information Setup

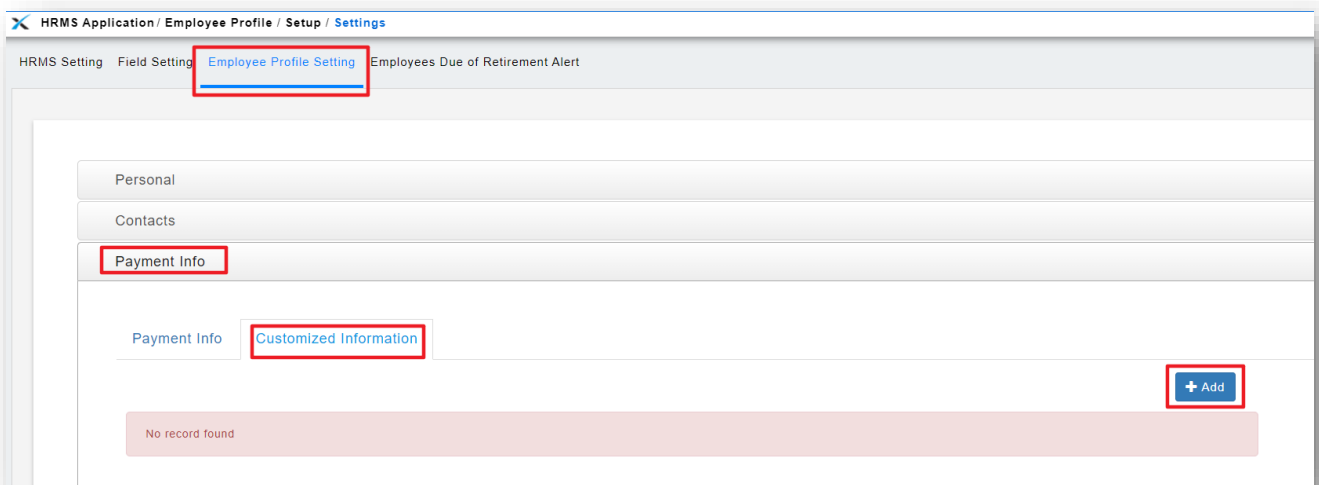For any Additional Information that require to be captured in the Employee Profile

1. Go to **Employee Profile -> Setup -> Settings**.

2. Select the 3rd tab – **Employee Profile Setting** then click on the **Payment Info** to expand the view.
3. Choose the **Customized Information** tab

i. To create a new custom info, click **+ Add**

ii. After **+ Add** is clicked, the screen will be shown as below:

iii.   Below are the explanations for each field:

    a) **Display Header** - The displaying name of the custom field

    b) **Compulsory** – To specify the field is a mandatory or optional

    c) **Display Information** – To give a brief explanation on the purpose of the field

    d) **Control Type** – Control the behaviour of the field. Below are the available controls:

- Text Only
- Date Only
- Dropdown Menu *(Please refer to item v. for further information)*
- Whole Number
- Decimal Number

iv.   **Character Limit/Amount Limit** – To specify the input limit *(Depends on the control type, some may not have the limit control)*

v.   If you select **Control Type: Dropdown Menu,** additional box will appear below to allow creation of dropdown value as shown below:

After everything is done, click to save the record

1. Go to **Employee Profile** -> Setup –> **Settings** -> Employee Profile Setting -> Payment Info -> **Customized Information**.


2. To update the existing custom info, click on the custom info record as highlighted in red.

    i.   Update the info then click [H Save]

    Please refer to Appendix A for updating from control type to another control type.

1. Go to **Employee Profile** -> Setup –> **Settings** -> Employee Profile Setting -> Payment Info -> **Customized Information**.
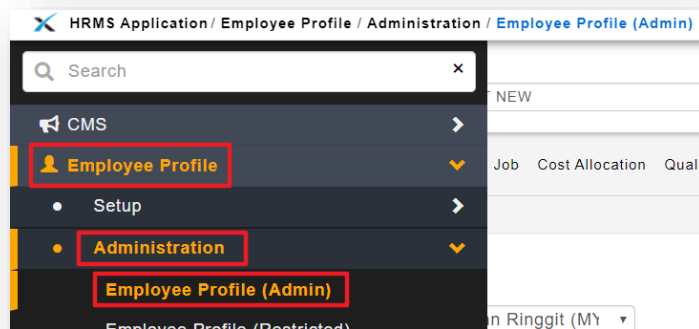

2. To Delete the existing custom info, click on the custom info record as highlighted in red

   i. Click **🗑 Delete** to delete the selected custom info

1. Go to Employee Profile -> Administration -> **Employee Profile (Admin)**

2. Admin is able to key in the relevant info in the customized information via Employee Profile
   * *Indicates mandatory field*
   i. Fill up the customized information and click "**Save**" to save the data

If the Customized Information is **yet being filled up with data** in any employee profile, it **can still be updated** from existing control type to another control type.

Otherwise, please refer to the table below:

From \ To	Text	Date	Dropdown	Dropdown with Text	Whole Number	Decimal
Text	■	✔ *	✘	✘	✔	✔
Date	✔	■	✘	✘	✘	✘
Dropdown	✔	✘	■	✔	✘	✘
Dropdown with Text	✔	✘	✔ *	■	✘	✘
Whole Number	✔	✘	✘	✘	■	✔
Decimal	✔	✘	✘	✘	✔ *	■

✔	Allow
✘	Not allow
■	Nothing to check
*	Depends on situation

* For Text -> Date, if the existing data is in date format, amendment is allowed.

* For Dropdown with Text -> Dropdown, if existing data does not have a free text, amendment is allowed.

* For Decimal -> Whole Number, if existing data is in whole number format, amendment is allowed.