

Managing Employees

Topics in this section focus on employee management and maintenance in FTD Mercury, including tracking their personal information as well as sales and employment information. Almost all configurations for employees are performed through Mercury Administration (see [Employee Folder](#) on page 24–51 for details).

Adding Employees

You should add employees to FTD Mercury and not use the default logins so you can track employee productivity and restrict access to areas of FTD Mercury. Once you have added an employee, you can set the employee's password, allowing each employee to log in separately to the system.

TASK

To add an employee in Mercury Administration:

- 1 Access the **Employees** screen in **Mercury Administration**.
- 2 Right-click on the screen (not on an existing employee), point to **New**, and select **Employee**.
- 3 When a message appears asking if you want to add a new employee, click **Yes**. An icon labeled **New Employee** appears.
- 4 Double-click the **New Employee** icon. The screen displays information about the new employee.
- 5 Fill in information about the employee.
- 6 Click **Apply** to save your changes before leaving this screen.

Figure 6-1: Adding Employees

Name: Paul Skobel Employee ID: Paul

Address Information
Home 440 Main Street
DOWNERS GROVE, IL 60515
 Primary Address

Phone Information
Home 630-555-7677
 Primary Phone

Allow this Employee Online
Login Name: Paul
Language: English

Password: *****
Confirm: *****

Active Status
Social Security No: 555-55-5555
Employee Type: Full Time
Job Category: Designer

Notes
Available to work: M-F 9am to 5:30pm

Apply Terminate... Undo

Editing Existing Employee Information

TASK To access details about an employee:

- 1 Access the **Employees** screen in **Mercury Administration**.
- 2 Double-click on an employee. Employee details appear for that employee.
- 3 Change information about the employee as necessary.
- 4 Click **Apply** to save your changes before leaving this screen.

Requiring Employee Names in Order Entry and Point of Sale

FTD Mercury provides a setting that allows you to require that employees select their employee name when entering an order in either Order Entry or Point of Sale.

TASK To require employees to select their name in Order Entry and Point of Sale:

- 1 On the **Tools** menu, click **Settings**.
- 2 On the **FTD Mercury Configuration** window, in the **Order Entry/POS** area, select **Prompt for Employee Name**.
- 3 Click **Save**.

After you have done this, the Employee list in Order Entry and Point of Sale is by default blank when filling out a new order. Employees must select their employee name from the list before they can complete orders.

Changing Employee Passwords

You can change employee passwords in both FTD Mercury and within Mercury Administration.

Changing Employee Passwords in FTD Mercury

TASK To change an employee's password within FTD Mercury:

- 1 On the **Tools** menu, click **Change Password**.
- 2 In the **Login** field, enter the login name of the employee that you want to change.
- 3 In the **Old Password** field, type the old password for this employee. Asterisks (****) appear to protect the password.
- 4 In the **New Password** field, type a new password.
- 5 In the **Confirm Password** field, type the new password again to confirm.
- 6 Click **Save**.

Changing Employee Passwords in Mercury Administration

TASK To change an employee's password in Mercury Administration:

- 1 Access the **Employees** screen in **Mercury Administration**.
- 2 Double-click the employee to display employee details.
- 3 In the **Password** field, delete the existing password (displayed in asterisks) and then enter the new password.
- 4 Enter the new password again in the **Confirm** field.
- 5 Click **Apply**.

FTD Server Password Window

The FTD Server Password window is used to change an employee's password in your FTD Mercury system.

Figure 6-2: FTD Server Password Window

The screenshot shows a dialog box titled "FTD Server Password". It has a blue title bar with a close button (X) in the top right corner. The main area is light gray and contains four text input fields stacked vertically. The first field is labeled "Login:" and contains the text "Kristie". The second field is labeled "Old Password:" and contains several asterisks. The third field is labeled "New Password:" and contains several asterisks. The fourth field is labeled "Confirm Password:" and contains several asterisks. At the bottom of the dialog, there are two buttons: "Save" and "Escape".

The existing password must be entered first, and then the new password must be entered twice to change the employee password.

Terminating an Employee in Your System

TASK To terminate an employee in your system:

- 1 Access the **Employees** screen in **Mercury Administration**.
- 2 Double-click the name of the employee you want to terminate.

- 3 Click **Terminate**.
- 4 When the **Terminate Employee** window opens, enter the date of termination for the employee and click **Terminate**.
- 5 When prompted for whether you want to terminate the employee, click **Yes**.

Once you exit Mercury Administration and re-launch it, the terminate employee's name appears in the Employees screen with a red X through it.

Activating Terminated Employees

TASK To activate an employee that has been terminated:

- 1 Access the **Employees** screen in **Mercury Administration**.
- 2 Double-click on the terminated employee's name. Employee details (grayed out) appear with this employee's information.
- 3 Click **Activate**.
- 4 When the **Terminate Employee** window opens, click **Activate**.
- 5 When you are prompted whether you want to activate this employee, click **Yes**. The **Employee** details become active so you may change information as needed.
- 6 Click **Apply** to save your changes before exiting this screen.

Once you exit Mercury Administration and re-launch it, the red X that was on the employee's name disappears.

Handling Employee Payroll

FTD has teamed up with Intuit Payroll Services to provide you with several Payroll options by using Payroll through QuickBooks. QuickBooks Payroll is an easy, hassle-free way to run Payroll and pay your Payroll taxes. QuickBooks offers many payroll services such as tax table updates, tax deposit and filing, W-2 preparation, and even check delivery. If you sign up for Payroll through QuickBooks, you are billed directly through Intuit.

For more information on QuickBooks Payroll options, go to www.payroll.com or call Intuit at 866-238-3345 to get a free quote. If you mention that you are an FTD member florist and that FTD is part of Intuit Payroll Services' affiliate program, you will receive a 15% discount on select products and services.

Tracking Employee Time

FTD has partnered with Count Me In to provide you with an easy, efficient way to keep track of your employees' time. Every time an employee checks in or out, they tap a finger on a scanner that is attached to your PC. After the PC recognizes the employee's fingerprint, the precise entry or exit time is recorded. This information is then compared to the employee schedule that you set up, and you are notified if there are any discrepancies with the schedule (late arrivals, long breaks, etc.) the next morning.

At the end of the pay period, you can then use Count Me In's QuickBooks importing tool to import the timeclock information into QuickBooks, where you can run your Payroll (see [Handling Employee Payroll](#) on page 6-4) and print checks.

TIP

Count Me In is easy to install and simple to operate. No special training is required. For more information on Timeclock, call Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com.

Employee Reports

If your FTD Mercury system includes Accounts Receivable, Order Entry, or Point of Sale, it also includes several employee reports. Learn more about available reports in [Business Reports](#) on page 19-1.

Employee Types

Employee types are used when entering new employees into FTD Mercury. By default, there are two employee types in your system: Full Time and Part Time. You may want to add additional employee types (for example, seasonal, student, contract, etc.) for your needs. Employee types are not used in reporting or in searches.

Adding Employee Types

TASK

To add an employee type:

- 1 Access the **Employee Type** screen in **Mercury Administration**.
- 2 In the upper text box, enter the new employee type and click **Add**.
- 3 Click **Apply** to save the changes before exiting this screen.

Removing Employee Types

TASK

To remove an employee type:

- 1 Access the **Employee Type** screen in **Mercury Administration**.
- 2 Select the employee type you want to remove from the lower text box and click **Remove**.

NOTE

An employee type cannot be removed if any employee is labeled with that type.

- 3 Click **Apply** to save the changes before exiting this screen.

Job Functions

Job functions are used to determine the level of access your employees have in the system. For example, you may want your "Manager" employee job function to access all levels of the program, but you want your "Clerk" to access only the Order Entry and search functions. Procedures in this section teach you how to add or remove job functions. (To learn how to change employee access level, refer to [Window Access Screen](#) on page 24-57 after adding any job functions.)

NOTE

A job function cannot be removed if any employee is labeled with that type.

Adding Job Functions

TASK To add a job function:

- 1 Access the **Job Functions** screen in **Mercury Administration**.
- 2 Right-click in the **Job Functions** screen (but not on an existing job function), point to **New**, and select **Job Function**.
- 3 In the **Job Functions** window, in the upper field, enter the new job function name and click **Add**.
- 4 Click **Apply** to save your changes before exiting this window.

Removing Existing Job Functions

TASK To remove an existing job function:

- 1 Access the **Job Functions** screen in **Mercury Administration**.
- 2 Right-click in the **Job Functions** screen (but not on an existing job function), point to **New**, and select **Job Function**.
- 3 In the **Job Functions** window, from the list of existing job functions, select the job function you want to remove and click **Remove**.
- 4 Click **Apply** to save your changes.

Security

There are three types of security you can set for employees in FTD Mercury:

- » **Employee-Level Security**—Employee-level security can be set for Point of Sale functions only. These settings can be set in addition to what you have set for the employee's job function. Note that employees have equal rights in all stores. When you set up an employee in Mercury Administration, that employee's security settings apply at all locations.

NOTE Job function-level security overrides employee-level security.

- » **Job Function–Level Security**—Job function-level security is security that you set that is the same for all employees in a particular job function. For example, you may want to restrict all clerks from performing a No Sale transaction in Point of Sale, or you may want all Managers to be able to terminate an employee. When you create these settings for a job function, you create them for all employees in the job function. These settings override settings that you set for specific employees.
- » **Window Access**—Initially, your system is set to grant full access to all windows for all employees. However, you may wish to limit the level of access per job function. For example, you may prefer that your clerks not have access to employees' personal information. The following procedure teaches you how to limit access to the program for some employees. The message "You are not authorized to use this function" displays if the employee tries to access a restricted area.

TIP Window access displays the same list of program areas as individual job function security levels. However, because you can see all job functions at the same time in the Window Access screen, you may find it easier to compare access between different job functions.

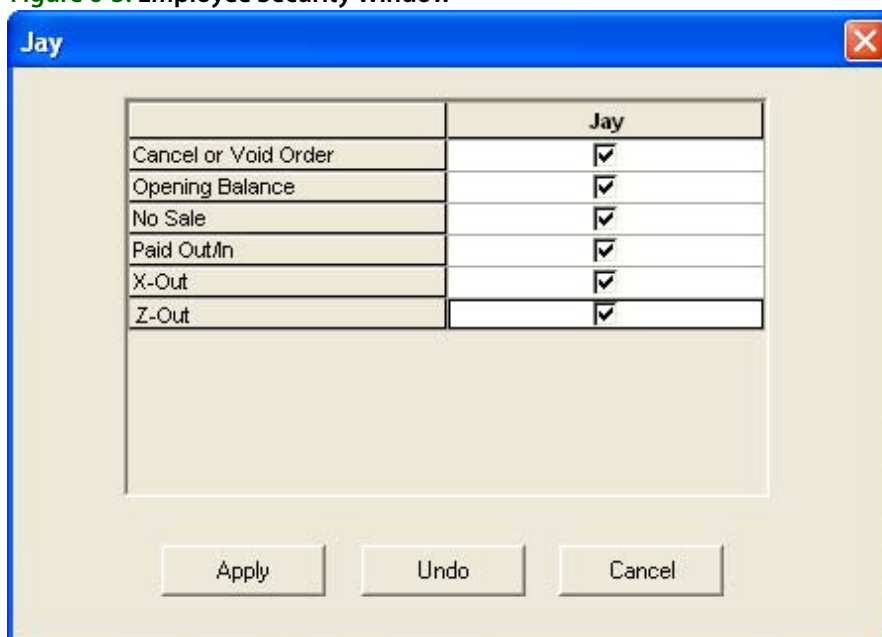
Setting Employee-Level Security

TASK To access employee-level security for a specific employee:

- 1 Expand the **Employees** menu in **Mercury Administration**.
- 2 Right-click on the name of the employee, then click **Security**. A window with the employee's name opens.
- 3 Each Point of Sale function is listed with a check mark next to it. For the functions you want the employee to be able to perform, ensure the check box is selected.
- 4 Click **Apply** to save the changes.

Employee Security Window

Figure 6-3: Employee Security Window



Single employee security can be set for Point of Sale functions only. These settings can be set in addition to what you have set for the employee's job function.

NOTE Job-function level security overrides single employee security.

In this window you can indicate which transaction types this employee can perform in Point of Sale. For every transaction type that you will like the employee to perform, click in the box so that a check mark appears. For all of the transactions that are left unchecked, the employee will not be able to perform. Click Apply when you are finished making changes.

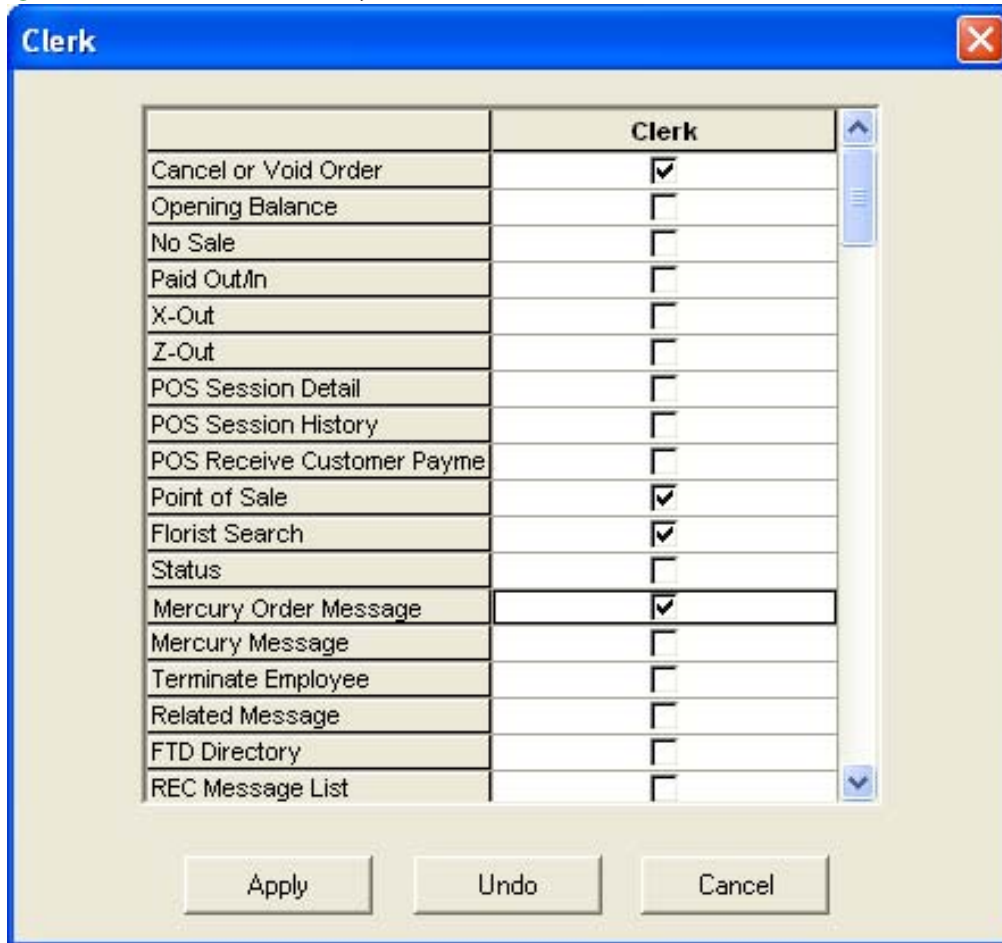
Setting Job Function–Level Security

TASK To set job-level security for a job function:

- 1 Access the **Job Functions** screen in Mercury Administration.
- 2 Right-click on the job function you want to set security for and click **Security**.
- 3 Select check boxes for areas of the program to which you want that job function to have access.
- 4 Click **Apply** to save changes before exiting this window.

Job Function Security Window

Figure 6-4: Job Function Security Window



Job function-level security is security that you set that is the same for all employees in a particular job function. For example, you may want to restrict all clerks from performing a No Sale transaction in Point of Sale, or you may want all Managers to be able to terminate an employee. When you create these settings for a job function, you create them for all employees in the job function. These settings override settings that you set for specific employees.

For every area of the program that you will like the employees to access, select the corresponding check box. For all of the areas that are left unchecked, the employees will not be able to access. Make sure that you scroll down to see all the options.

Once you have finished making changes, click Apply to save them, click Undo to revert to the settings that were there when you opened the window, or click Cancel to close the window without saving changes.

Setting Window Access for Employees

TASK To set window access levels for employees:

- 1 Access the **Window Access** screen in **Mercury Administration**.
- 2 Initially, all employees may access every area of the program. To change the access level, click the field in the appropriate column to reveal an arrow. Click the arrow button and select either **Full access** or **No access** for each job function and window
- 3 Click **Apply** to save the changes before exiting this screen.

Searching for Employees

If you want to view employee information (such as address, phone number, and login name), you must first locate the employee's data through an Employee Search.

TASK To perform an employee search:

- 1 On the **Search** menu, click **Employee Search**. The **Employee Search** window opens.
- 2 In the **Search Parameters** area, in the text box, type the name, part of the name, or telephone number of the employee for whom you are searching.
- 3 Click **Search**.
- 4 In the results list, double-click on an employee to view the employee's information. Use Mercury Administration to make changes to employee information. See [Editing Existing Employee Information](#) on page 6-2 for more information.

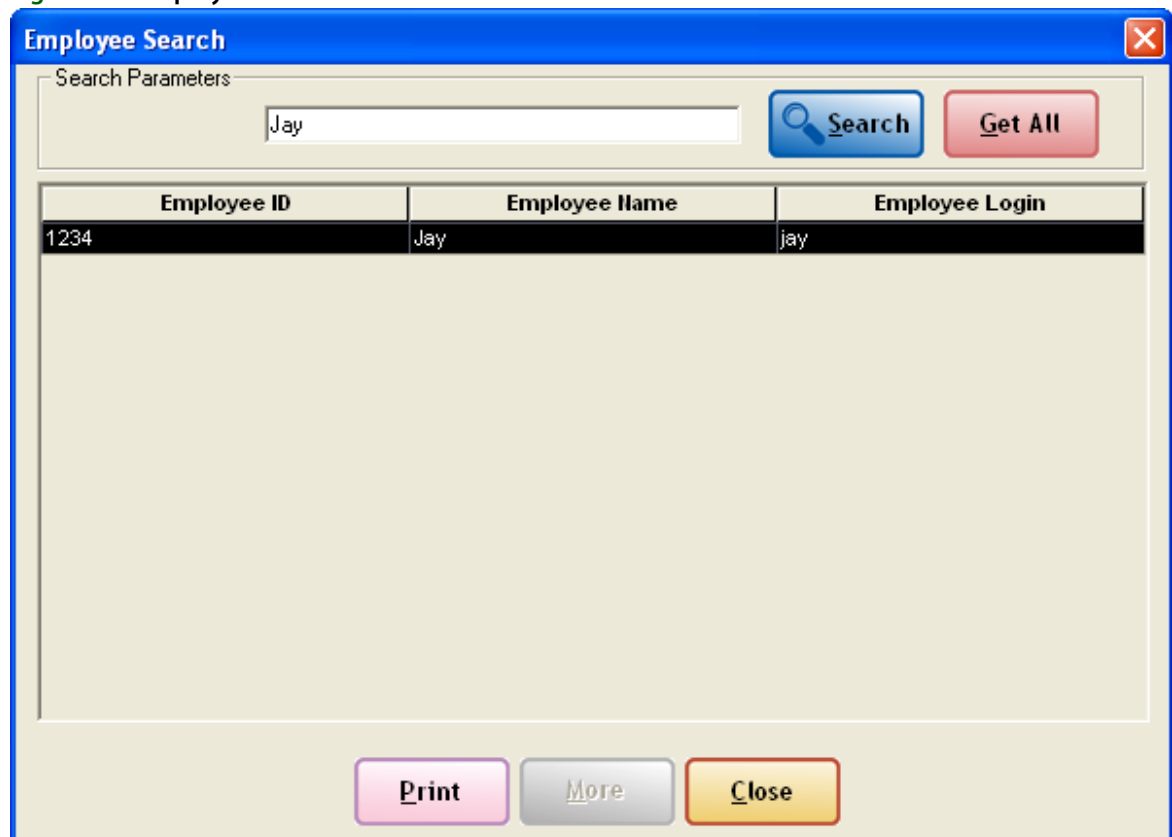
TIP If you want to retrieve information for all your employees, click **Get All** in the Employee Search window. Then, double-click on the individual employee records to display information for each employee.

Employee Search Window

The Employee Search window opens when you select Employee Search from the Search menu in FTD Mercury. In the Search Parameters area, you can enter the name (full or partial) for the employee and then click Search. You can also click Get All to get all employees in FTD Mercury. Matching employees appear in the results list, which includes the employee ID, name, and login.

Click Print to print the results list. Click More to display additional employees in the results list (if the search returned more results than could fit on the window). Click Close to close the window.

Figure 6-5: Employee Search Window



Employee History Information Window

The Employee History Information window displays an employee's address, phone number, position, date of hire, and termination.

Figure 6-6: Employee History Information Window

The screenshot shows a window titled "Employee History Information" with a blue title bar and a close button. The window contains a form with the following fields:

- Name: Jay (dropdown menu)
- Address Information: 3113 Woodcreek Dr., DOWNERS GROVE, IL 60515, 630-555-1212

Below the form is a table with three columns: Hired, Terminated, and Position. The first row of data shows the date 01/30/08 in the Hired column and Admin in the Position column. The Terminated column is empty. A "Close" button is located at the bottom of the window.

Hired	Terminated	Position
01/30/08		Admin

In the Name field, click the down arrow and select the employee's name. The employment history information will display.

Employee Sales Report Window

The Employee Sales Report window displays an employee's total number of transactions and total sales volume for a given date range. You can use this window to generate an employee sales report.

Figure 6-7: Employee Sales Report Window

From Date	To Date	Order Count	Order Amount
02/18/03	02/18/03	14	1749.31

Generating an Employee Sales Report

TASK To generate an Employee Sales Report from the Employee Sales Report window:

- 1 On the **Management** menu, click **Employee Sales Summary**. The **Employee Sales Report** window opens.
- 2 At the top of the window, select whether you would like to display **Daily Sales Data**, **Weekly Sales Data**, or **Monthly Sales Data**. For example, if you choose weekly sales data, the total number of transactions and the total volume of sales (for the given employee) will display per week.
- 3 In the **Employee Name** field, click the down arrow and choose the employee's name.
- 4 Select a beginning date. Click the down arrow in the **From Date** field to select the starting date for which you would like to display statistics.
- 5 Select an ending date. Click the down arrow in the **To Date** field to select the ending date for which you would like to display statistics.
- 6 Click **Search**. The employee sales report will display.
- 7 Click **Print** to print the report.

