



## Add Leave

# CA CloudDesk





01



## Step 1: Go to Dashboard, then select Profile

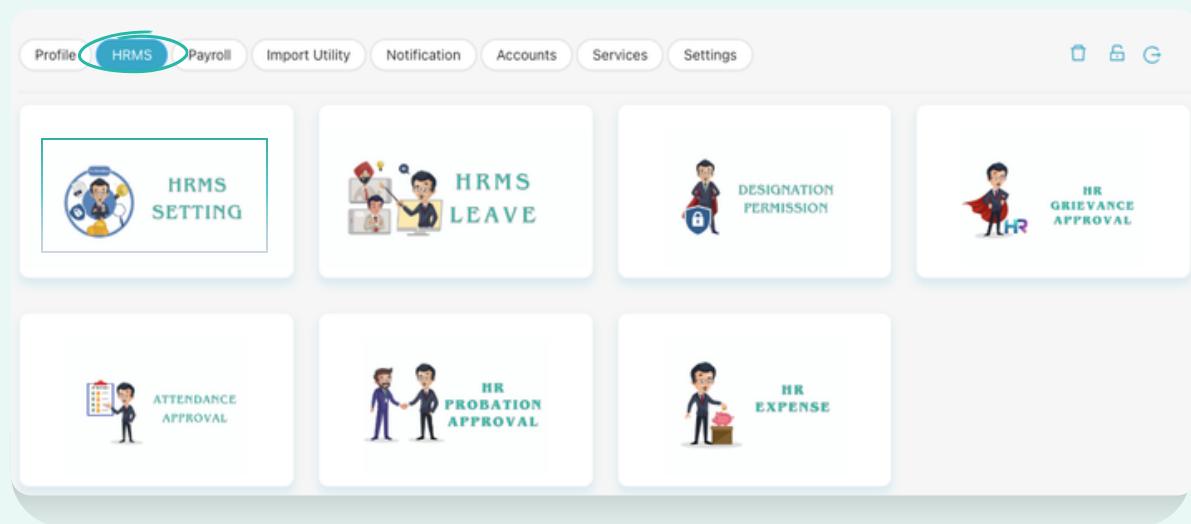
From the main Dashboard, click your profile icon from the top-right corner of the header to open your profile area.

The screenshot shows the CA CloudDesk dashboard. On the left is a sidebar with various icons and labels: Dashboard, HRMS, CRM, Communication, Document Vault, My Services, Task, Litigation, Billing, Website, and Reports. The main area features a welcome message for 'Karishma Sharma' (CA CloudDesk | Sat, February 14). It includes a 'Quick Links' section with icons for My Attendance, My Leaves, Add Invoice, Create Docs, Client Groups, and Calender. Below this is a 'My Tasks' section with tabs for Processing, Open, Finalized for Submission, Overdue, Stuck, Completed, and Under Consultation. A search bar and a '+' button are at the top of this section. The top right of the dashboard has a 'Check In' button, the time '13:16', a calendar icon, a bell icon, and a profile icon labeled 'Kamal As...' which is highlighted with a green oval. The background of the dashboard has a light blue grid pattern.

## Step 2: Select HRMS, then HRMS Setting

- In the left navigation sidebar, click HRMS.
- On the HRMS page, use the top tabs and select HRMS Setting .





### Step 3: Select Leave tab and then click the + icon

- Inside HRMS Setting, click the Leave tab. Then click the blue + button
- You will see two options:
  - Add From Template – to add from predefined leave templates &
  - Add leave – to create a new leave type manually.

HRMS Setting

#	Leave Name	Leave For	Leave Abbreviation	Hours	Action
1	Good Friday	MALE FEMALE OTHER	GF	--	
2	Leave 1	FEMALE MALE OTHER	L1	--	
3	Leave 2	FEMALE MALE OTHER	L2	--	
4	Leave 3	MALE FEMALE OTHER	L3	--	
5	Leave 5	MALE OTHER FEMALE	L5	--	
6	Leave 4	MALE FEMALE OTHER	L4	--	
7	Casual Leave	MALE FEMALE OTHER	CL	--	
8	Sick Leave	MALE FEMALE	SL	--	

+ Add From Template  
Add leave

## A: Add from Template

- Opens the Leave Template modal with a table of predefined leave types.
- Use the action icon on a row to add that template as a new leave type.

Leave Template

#	Leave Name	Leave For	Leave Abbreviation	Hours	Action
1	Exam Leave	MALE,FEMALE,OTHERS	EXL	--	
2	Sick Leave	MALE,FEMALE,OTHERS	SL	--	
3	Earned Leave	MALE,FEMALE,OTHERS	EL	--	
4	Audit Leave	MALE,FEMALE,OTHERS	AL	--	
5	Tax Filing Leave	MALE,FEMALE,OTHERS	TFL	--	
6	Training Leave	MALE,FEMALE,OTHERS	TL	--	
7	Grace Period	MALE,FEMALE,OTHERS	GP	--	
8	Optional Holiday	MALE,FEMALE,OTHERS	OH	--	

## B: Add Leave

- Opens the Add Leave form to create a leave type manually. Fill in the required fields .
- Leave Name – full name of the leave type
- Leave Abbreviation – short code (e.g. CL, SL)
- Leave Payable: Yes – checkbox if the leave is paid
- Applicable Genders – MALE, FEMALE, OTHERS as needed
- Credit Frequency – leave credit type
- Next Credit Date – date picker
- Past Days, Future Days
- Leave Type – dropdown
- Hourly Count, Sandwich, Optional, Auto Approved – checkboxes as per policy
- Max Count – maximum leave days (required)
- Max Count With Holiday –optional
- Click Save to add the leave type.



### Add Leave

Leave Name \*

Leave Abbreviation \*

Leave Payable: Yes

Applicable Genders \*

Credit Frequency \*

Leave Credit Type

Next Credit Date \*

Past Days \*

Future Days \*

Leave Type \*

Hourly Count  | Sandwich  | Optional  | Auto Approved

Max Count \*

Max Count With Holiday \*

