



Allocate Leaves To Employees

CA CloudDesk

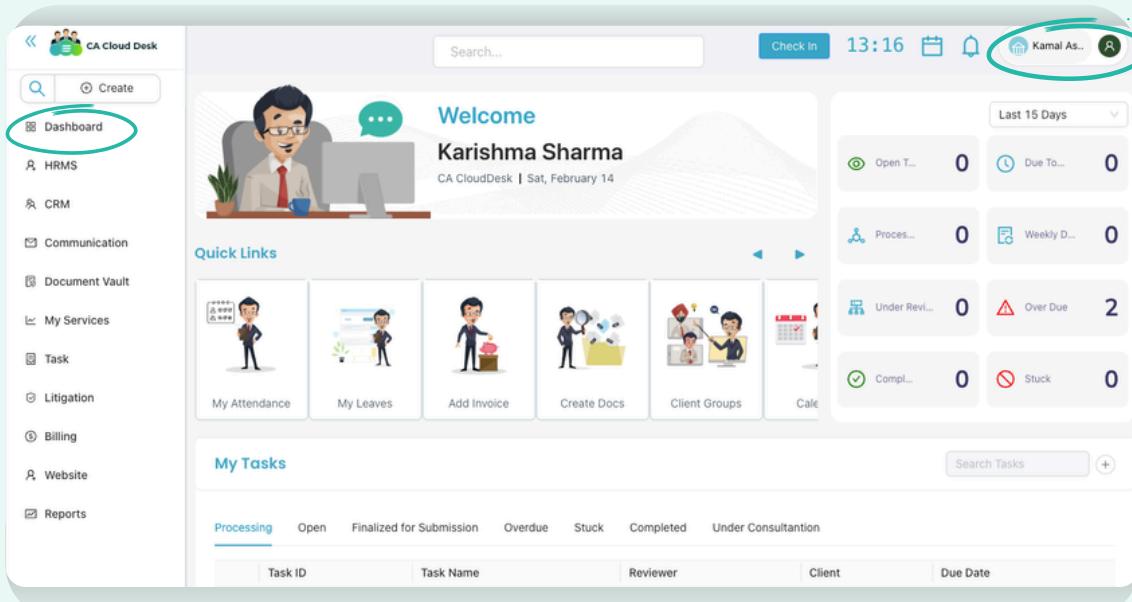


Part A



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.



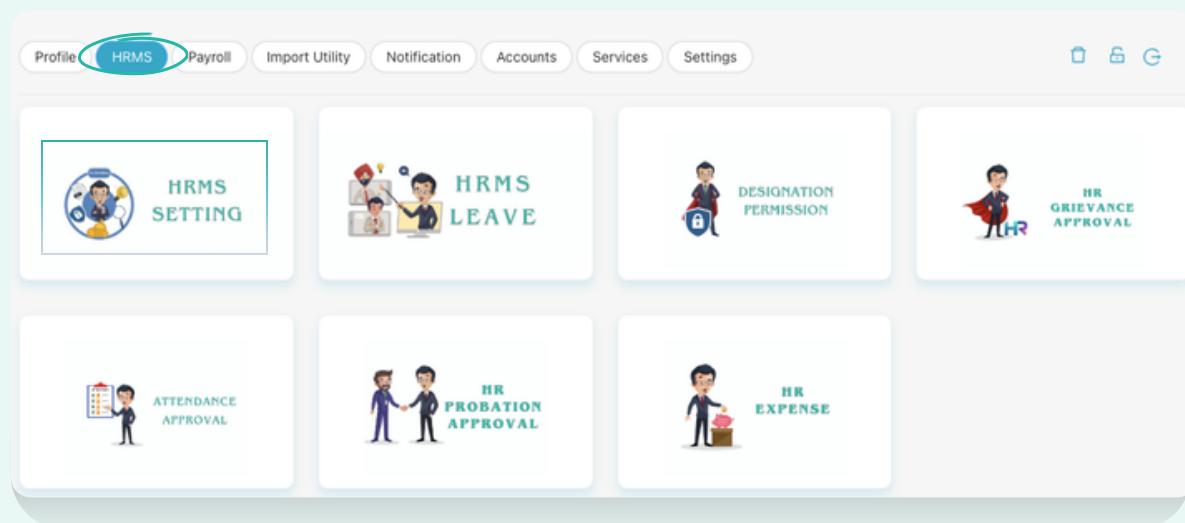
Step 2: Select HRMS, then HRMS Setting

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





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Step 3: Select Leave Quota

Select Leave Quota, then click the + (plus) icon to add a new leave quota.

#	Leave	Designation	Branch	Annual Count	Action
1	Good Friday (GF)	Sales Executive	Mumbai	12	

Step 4: Add Leave Quota

Fill Leave type, Branch, Designation, and Annual count, then click Save.

Leave quota setting created successfully.

Leave *	Branch *
Leave	Branch
Designation *	Annual Count *
Select Holiday Type	Number of Days

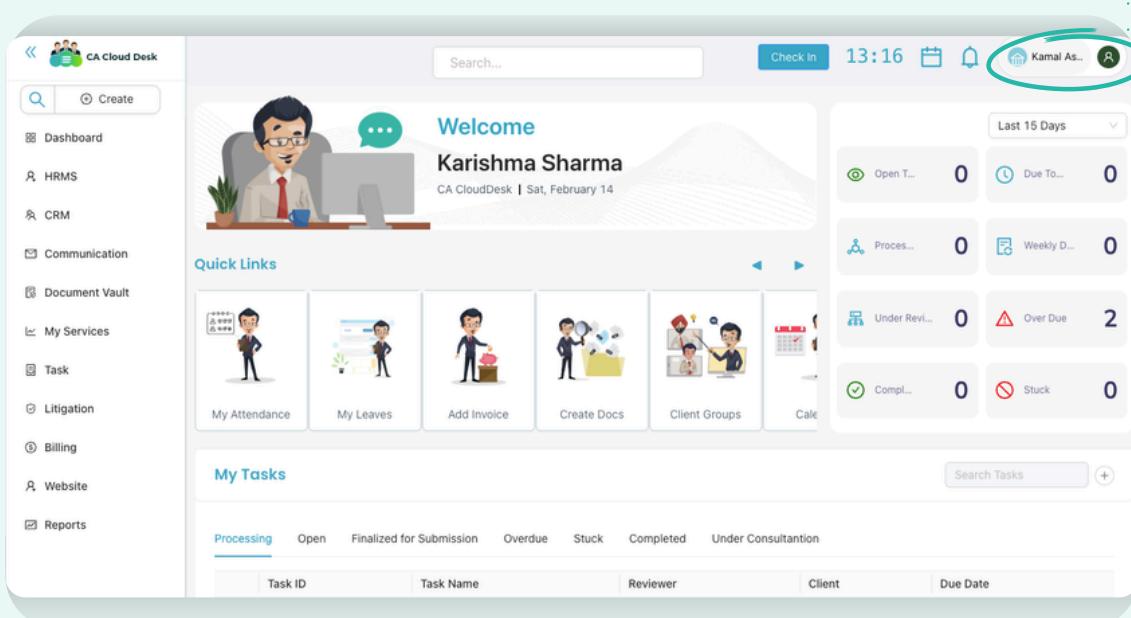
Save

Part B



Step 1: Go to Dashboard, then select Profile

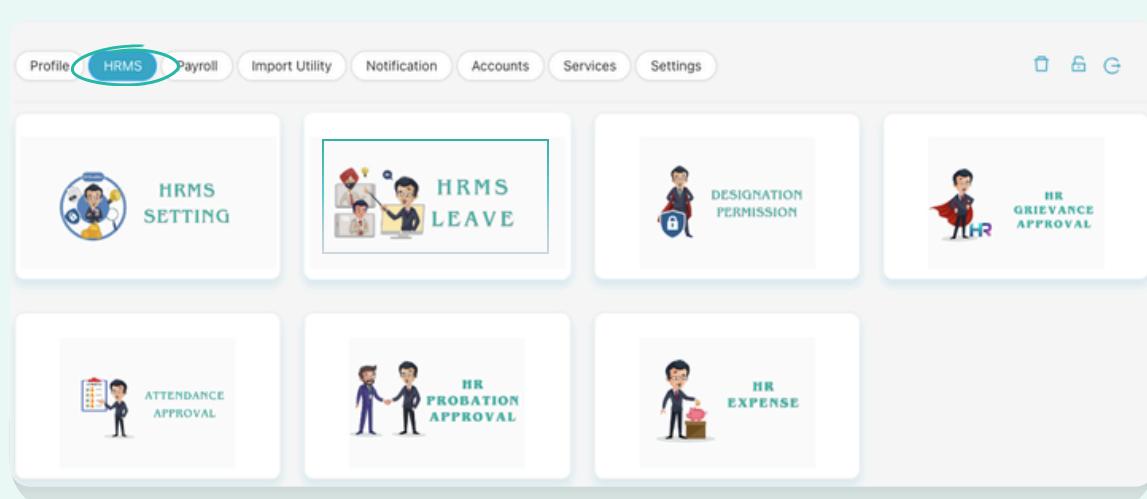
From the main Dashboard, click your profile icon from the top-right corner of the header to open your profile area.



The screenshot shows the CA CloudDesk dashboard. On the left is a sidebar with various menu items: Dashboard, HRMS, CRM, Communication, Document Vault, My Services, Task, Litigation, Billing, Website, and Reports. The 'Dashboard' item is selected. In the center, there's a 'Welcome' section for 'Karishma Sharma' with a date 'CA CloudDesk | Sat, February 14'. Below it are 'Quick Links' for My Attendance, My Leaves, Add Invoice, Create Docs, Client Groups, and Calendar. To the right is a 'My Tasks' section with a grid of status indicators for 'Open T...', 'Due To...', 'Proces...', 'Weekly D...', 'Under Revi...', 'Over Due', 'Compl...', and 'Stuck'. At the bottom is a table for 'My Tasks' with columns for Task ID, Task Name, Reviewer, Client, and Due Date. The 'Processing' tab is currently selected.

Step 2: Select HRMS, then select HRMS Leave

Select HRMS, then select HRMS Leave

The screenshot shows the HRMS module interface. At the top, there are tabs: Profile, HRMS (which is highlighted with a green circle), Payroll, Import Utility, Notification, Accounts, Services, and Settings. Below the tabs are several cards representing different HRMS functions: 'HRMS SETTING' (with a person icon), 'HRMS LEAVE' (with a person icon), 'DESIGNATION PERMISSION' (with a lock icon), 'HR GRIEVANCE APPROVAL' (with a person icon), 'ATTENDANCE APPROVAL' (with a clipboard icon), 'HR PROBATION APPROVAL' (with two people shaking hands), and 'HR EXPENSE' (with a person and a piggy bank icon). The 'HRMS LEAVE' card is specifically highlighted with a green border.

Step 3: Select HRMS Leave, then select Leave Credit/Debit

Select Leave Credit/Debit and then + icon



HRMS Leave

Leave Credit/Debit		On Duty
View Leave	Comp Off	Leave Count
Leave Log		
<input type="text" value="Select Employee"/>		
Credit/Debit	<input type="button" value="Credit"/>	Remarks
<input style="outline: none; border: none;" type="button" value="+"/>		
Name	Count	
Good Friday	<input type="text" value="0"/>	
Leave 1	<input type="text" value="0"/>	
Leave 2	<input type="text" value="0"/>	
Leave 3	<input type="text" value="0"/> <input style="outline: none; border: none;" type="button" value="▲"/> <input style="outline: none; border: none;" type="button" value="▼"/>	
Leave 5	<input type="text" value="0"/>	
Leave 4	<input type="text" value="0"/>	
Casual Leave	<input type="text" value="0"/>	
Sick Leave	<input type="text" value="0"/>	
<input type="button" value="Save"/>		

Step 4: Upload Your Sample Excel File

Click to upload your prepared Excel file, Enter Remarks (if required), then click

Save. Leave allocations applied in bulk according to your uploaded file.

Bulk Upload

Download the [sample Excel file](#) and prepare and upload the Excel file below according to the guidelines mentioned in the sample Excel file.

Remarks