

- **Introduction**

Platinum is a web application to manage credit card application process, personal loan process, expenses management, attendance records and payroll management etc

- **Login**

Platinum allows users to log in using your username and password to you by the admin.

The screenshot shows the login interface for the PlatinumSmart application. On the left, there is a logo consisting of a stylized blue 'P' inside a square frame. To the right of the logo, the text 'PlatinumSmart' is written in a large, bold, blue font, with 'Tech India Pvt Ltd' and 'Grow With Us' in smaller text below it. At the top right, there is a link 'Sign In To Your Account'. Below this, there are two input fields: 'Username *' and 'Password *'. To the right of the 'Password' field is a small circular icon containing a question mark. At the bottom right is a dark blue rectangular button labeled 'Login'.

Fig. Login Page

- **Access Control**

- Login with valid .credentials
- Click on access control module.
- Click on search field.
- Search username which admin wants to give access of particular module to that user.
- Click on edit operation.

Sr. No.	Employee Code	Employee Name	Role	Designation	Operation
1	2100	saima shaikh	Accountant	TME	
2	4105	SHUBHAM SHUKLA	Accountant	TME	
3	4104	VISHAL KATHE	Accountant	TME	
4	3709	KIRTI ANIL NIMBALKAR NIMBALKAR	Accountant	TME	
5	3961	ALAM MULANI	Accountant	TME	

Fig. Access Control

- Click on the checkbox of particular module which admin wants to give access to the user.
- Click on the update button.
- Click on cancel button if user wants to navigate back to the access control page.

Employee Name: Aishwary Nair

Expense Module

Configuration Module

Attendance Module

MIS Module

Fig. Access Control Update Button

• Configuration

- Click on configuration module.

a) Department Master

- Click on department master.
- Click on add department button.
- Enter department name.
- Click on create button.

The screenshot shows a top navigation bar with tabs: Employee Master, Department Master (which is selected and highlighted in blue), Office Master, and Team Master. Below the navigation is a breadcrumb trail: Dashboard > Department Master > Department Form. The main area contains a form with a 'Department Name' field containing 'Computer'. To the right of the field are two buttons: a blue 'Create' button and a red 'Cancel' button. A red arrow points downwards from the text 'Click on create button.' towards the 'Create' button.

Fig. Department Master

- Record will display in department master table.
- Search field is available if user wants to search department name.
- If user wants to update particular record then click on edit operation.

The screenshot shows a top navigation bar with tabs: Employee Master, Department Master (selected), Office Master, and Team Master. Below the navigation is a breadcrumb trail: Dashboard > Department Master. On the left, there is a blue 'Add Department' button. The main area displays a table with columns: Sr. No., Date, Department, and Operation. The table has five rows of data. In the 'Operation' column of the first row, there is a blue 'Edit' button and a red 'Delete' button, with a red arrow pointing to the 'Edit' button. The table data is as follows:

Sr. No.	Date	Department	Operation
1	Nov 19, 2018	PERSONAL LOAN	
2	Nov 16, 2018	SALES	
3	Nov 16, 2018	PICK uP exe	
4	Nov 15, 2018	pick up	
5	Nov 14, 2018	IT	

Fig. Department master edit button

- Enter department name.
- Click on the update button.
- If user keep department name as it is and click on the update button then “Department name already exist” pop up display.
- If user doesn’t want to update department name then click on cancel button.
- Click on the delete operation to delete particular record.

b) Office Master

- Click on office master

1. Add Office

- Click on add office sub tab.
- Enter city name.
- Enter address.
- Click on create button.
- Record will show in offices table.

Employee Master Department Master Office Master ▾ Team Master ▾

Dashboard > Office Master > Office Form

City *	Pune	Address *	Tilak road
		<input type="button" value="Create"/>	<input type="button" value="Cancel"/>

Fig. Add office

2. Offices

- Click on offices sub tab.
- Click on edit operation.
- If user wants to update city name and address then enter city and address.
- Click on the update button.

Employee Master Department Master Office Master ▾ Team Master ▾

Dashboard >Office Master > Office Form

City *	BANGLORE
Address *	BANGLORE
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

Fig. Offices Update Button

- Click on the delete button to delete particular record.
- If users want to search any record then click on search field.

2. Add Sub Office

- Click on add sub office.
- Select city.
- Enter sub office name.
- Click on the add button.
- Record will show in sub office table.

Employee Master Department Master Office Master ▾ Team Master ▾

Dashboard >Add Sub Office

City Name *	PUNE - HEAD OFFICE	Sub Office Name *	ABC	
<input type="text" value="Search"/> <input type="button" value="Add"/>				
Sr. No.	City	Address	Sub Office	Operation
1	PUNE	HEAD OFFICE	CORPORATION	
2	PUNE	HEAD OFFICE	BUND GARDEN	
3	MUM	DADAR	DADAR	
4	BGLR	KH ROAD	JAVED	
5	BGLR	KH ROAD	KAMAL	

Fig. Add sub Office

- Click on edit operation.
- If user wants to update sub office name then enter sub office name.
- Click on update button.
- If user doesn't want to update sub office name then click on cancel button.
- Click on delete button to delete particular record.
- Search field is available to search the record.

c) Employee Master

- Click on employee master.
- Click on add employee button.
- Enter employee code – User should be able to enter characters, integers, special symbols.
- Enter email id – User should be able to enter email id in "abc@gmail.com"
- Enter first name.
- Enter last name.
- Select role.
- Select designation.
- Select office.
- Select sub office.
- Select In time – HH:MM:AM/PM
- Select Out time – HH:MM:AM/PM
- Select department
- Enter password
- Click on password visibility – User is able to see entered password
- Choose date of joining
- Select process
- Select salary type
- Enter salary
- Bank Name
- Account No

- IFSC Code
- CITI DSR CODE
- ICICI DSR CODE
- HDFC DSR Code
- YES DSR Code
- SCB DSR Code
- RBL DSR Code
- INDUSIND DSR Code
- Hide Salary
- PF and ESIC
- Click on create button

Note: * indicates all fields are mandatory

Employee Code	<input type="text" value="Employee Code *"/>	Email	<input type="text" value="Email id *"/>
First Name	<input type="text" value="First Name ^"/>	Last Name	<input type="text" value="Last Name ^"/>
Role	<input type="text" value="Select Role *"/>	Designation	<input type="text" value="Select Designation *"/>
Office	<input type="text" value="Select Office *"/>	Sub Office	<input type="text" value="Select Sub Office *"/>
In Time	<input type="text" value="HH *"/> <input type="text" value="MM *"/> <input type="text" value="AM/PM *"/>	Out Time	<input type="text" value="HH *"/> <input type="text" value="MM *"/> <input type="text" value="AM/PM *"/>
Department	<input type="text" value="Select Department *"/>	Password	<input type="text" value="Password *"/>
Date Of Joining	<input type="text" value="Choose a date *"/>	Process	<input type="text" value="Process *"/>
Salary Type	<input type="text" value="Salary Type *"/>	Salary	<input type="text" value="Salary *"/>
<input style="background-color: #005a7b; color: white; border-radius: 5px; padding: 5px 10px; margin-right: 10px;" type="button" value="Create"/> <input style="background-color: red; color: white; border-radius: 5px; padding: 5px 10px;" type="button" value="Cancel"/>			

Fig. Employee Master Form

- After click on create button employee record will be show in the employee master table.
- Click on edit button if user wants to update employee record.
- Click on delete button to delete record.

- **Incentives**

- **FOS Freelancer**

- Click on incentive operation with FOS Freelancer designation.
- Go to Bank Card Amount section
- Select bank name and card type.
- Enter amount.
- Click on create button.
- Super admin need to approve that bank card and amount details by clicking on approved button.

Dashboard >Employee Master >Freelancer

Back **Approved**

Employee Name Employee Name Rahul Sanap	Last Edited By Last Edited By	Date Choose Date
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Bank Card Amount :

Bank Name Bank Name *	Card Type Card Type *	Amount Amount *
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Create **Clear**

Sr. No.	Bank Name	Card Type	Amount	Created Date	Last Edited By	Last Updated Date	Operation
1	ICICI-PUNE	CORAL CREDIT CARD	1200	23-12-2019 10:44:AM	Somnath-1001	23-12-2019 10:44:AM	

Fig.Fos Freelancer incentive of credit card

Personal Loan Incentive Slab:

Approved

From Amount From Amount *	To Amount To Amount *	Percentage Percentage *
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Create **Clear**

Sr. No.	From Amount	To Amount	Percentage	Created Date	Last Edited By	Last Updated Date	Operation
1	100000	500000	2%	23-12-2019 10:44:AM	Somnath-1001	23-12-2019 10:44:AM	
2	500001	900000	6%	23-12-2019 10:44:AM	Somnath-1001	23-12-2019 10:44:AM	

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Fig. FOS Freelancer Personal loan Incentive

- **FOS Target**
 - Click on incentive operation with FOS Target designation.
 - Go to Incentive Slab section
 - Enter point and rate .
 - Click on create button.
 - Super admin need to approve that point and rate details by clicking on approved button.

The screenshot shows a user interface for managing incentive slabs. At the top, there are buttons for 'Back' (red), 'Approved' (blue), and a search bar. Below this, the employee name 'Sayali Lokhande' is displayed. The main area is titled 'Incentive SLAB' and contains a table with two rows of data. The table has columns for Sr. No., Point, Amount, Created Date, Last Edited By, Last Updated Date, and Operation (with edit and delete icons). Above the table is a form with fields for Point (points.*), Rate, and Amount (*), along with 'Create' and 'Clear' buttons.

Sr. No.	Point	Amount	Created Date	Last Edited By	Last Updated Date	Operation
1	10	1200	24-12-2019 02:58:PM	Somnath-1001	24-12-2019 02:58:PM	
2	12	1500	24-12-2019 02:58:PM	Somnath-1001	24-12-2019 02:58:PM	

Fig.Incentive slab off credit card

Go to personal loan incentive section

- Enter From Amount and To amount fields
- Click on create button.
- Super admin need to approve that From and To Amount details by clicking on approved button.

The screenshot shows a user interface for managing personal loan incentive slabs. At the top, there is a button for 'Approved'. Below this, there are input fields for 'From Amount' and 'To Amount', and a percentage field. Below the input fields are 'Create' and 'Clear' buttons. The main area is titled 'Personal Loan Incentive Slab:' and contains a table with two rows of data. The table has columns for Sr. No., From Amount, To Amount, Percentage, Created Date, Last Edited By, Last Updated Date, and Operation.

Sr. No.	From Amount	To Amount	Percentage	Created Date	Last Edited By	Last Updated Date	Operation

Fig.Incentive slab of personal loan

- **Pick up executive incentive**

- Click on incentive operation of pick up executive designation.
- Enter Collection for all banks.
- Enter PL Commission.
- Click on the update button
- Click on approved button to approve the record.

Employee Name: SURAJ Shevate

Last Edited By: Somnath-1001

Date: 27-12-2019 11:09 AM

	HDFC *	ICICI *	CITI *	INDUSIND *
HDFC	200	300	0	0
SCB	0	YES	0	RBL

PL Commission :

Amount Per Pickup * 80

Update

Fig. Pick Up Executive

- Enter amount of selected bank name and card type.
- Approve bank card details by super admin.

Bank Card Amount :

Sr. No.	Bank Name	Card Type	Amount	Created Date	Last Edited By	Last Updated Date	Operation
1	HDFC-PAN INDIA	REGALIA FIRST	1000	27-12-2019 11:08:AM	Somnath-1001	27-12-2019 11:08:AM	

Items per page: 5 | < < > > |

- Enter from amount,to amount and percentage for the personal loan slab.

- Approve incentive slab by superadmin.

Personal Loan Incentive Slab:

Approved		
From Amount	To Amount	Percentage
From Amount *	To Amount *	Percentage *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Create	Clear	

Sr. No.	From Amount	To Amount	Percentage	Created Date	Last Edited By	Last Updated Date	Operation
1	100000	500000	1%	27-12-2019 11:09:AM	Somnath-1001	27-12-2019 11:09:AM	
2	500001	1000000	2%	27-12-2019 01:00:PM	Somnath-1001	27-12-2019 01:00:PM	

- **TME**

- **Process – Multi Salary Type – Target**

- Click on incentive operation of TME designation with process multi and salary type target.
- Enter points.
- Enter amount.
- Click on create button.
- User can edit point and amount by click on edit operation.

Sr. No.	Points	Amount	Last Edited By	Date	Operation
1	10	1000	Asif Shaikh	Nov 15, 2018	

Fig. TME Multi Target

- Once points and amount update and approved that incentive then user get incentive according to TME excel sheet format.
- TME Cross Sell** - Enter Disbursed percentage for cross sell calculation and approved by super admin

Cross sell

Disbursed Percentage * 0 %

Update Approved

• **Process – Citi Salary Type – Target**

- Click on incentive operation of TME designation with process citi and salary type target.
- Enter booking.
- Enter Amount.
- Click on create button.
- Click on approved button.
- After click on approved button incentive will be approved.
- If user complete the target then incentive will calculate as per TME excel sheet format.

Back Approved Search

Booking Booking * Amount Amount *

Create Clear

Fig. TME Citi Target

- **Process – SCB Salary Type – Target**
- Click on incentive operation of TME designation with process scb and salary type target.
 - Enter booking.
 - Enter amount.
 - Click on create button.

- Click on approved button.
- After click on approved button, incentive will be calculated.
- When user completes the target then user get incentive as per SCB TME excel sheet format.

The screenshot shows a form for managing SCB targets. At the top left are 'Back' and 'Approved' buttons. A red arrow points from the 'Approved' button to a table below. On the right are 'Create' and 'Clear' buttons. Red arrows point from both the 'Create' and 'Clear' buttons to the same table. The table has columns for Sr. No., Booking, Amount, Last Edited By, Date, and Operation. It contains one row of data.

Sr. No.	Booking	Amount	Last Edited By	Date	Operation
	Booking *	Amount *			

Fig. TME SCB Target

Personal loan incentive slab -

- Enter From amount and To Amount fields
- Enter percentage and click on create button.
- Superadmin can approve details by clicking on Approved button

Personal Loan Incentive Slab:

The screenshot shows a form for creating personal loan incentive slabs. At the top left is an 'Approved' button. Below it are 'From Amount' and 'To Amount' fields, each with a 'Create' and 'Clear' button. To the right is a 'Percentage' field with a 'Create' and 'Clear' button. Red arrows point from the 'Create' and 'Clear' buttons to a table below. The table has columns for Sr. No., From Amount, To Amount, Percentage, Created Date, Last Edited By, Last Updated Date, and Operation. It contains one row of data.

Sr. No.	From Amount	To Amount	Percentage	Created Date	Last Edited By	Last Updated Date	Operation
	From Amount *	To Amount *	Percentage *				

- **Team Manager incentive -**

1) Process – Multi Salary Type – Target

- Click on incentive operation of designation team manager with process multi and salary type target.
- Enter each bank amount.
- Click on the update button.
- Click on approved button.

The screenshot shows a software interface for managing targets. At the top, there's a header with 'Incentive' and other fields like 'Employee Name' (AMOL SALVE), 'Last Edited By', 'Date', and 'Name'. Below this, there are two main sections for different bank targets:

- SCB SLAB:** Contains fields for 'Booking' (Booking *), 'Amount' (Amount *), and buttons for 'Create' and 'Clear'.
- CITI SLAB:** Contains fields for 'Booking' (Booking *), 'Amount' (Amount *), and buttons for 'Create' and 'Clear'.

Each section has a table with columns: Sr. No., Booking, Amount, Last Edited By, Date, and Operation. There are also navigation buttons at the bottom of each section.

Fig. Team Manager Multi Target

2) Process – Citi Salary Type – Target

- Click on incentive operation of designation team manager with process citi and salary type target.
- Enter booking.
- Enter amount.
- Click on create button.
- Click on approved button.

This screenshot shows the 'CITI SLAB' target entry section. It includes fields for 'Booking' (Booking *), 'Amount' (Amount *), and buttons for 'Create' and 'Clear'. Above these fields are input fields for 'Employee Name' (TUSHAR BHAMRE), 'Last Edited By', 'Date', and 'Name'. Below the input fields are fields for bank targets: HDFC, ICICI, CITI, RBL, and INDUSIND, each with a value of 0. A large red arrow points from the 'Create' button down to the 'Update' button, indicating a workflow step.

Fig. Team Manager Citi Target

3) Process – SCB Salary Type – Target

- Click on incentive operation of designation team manager with process SCB and salary type target.
 - Enter booking.
 - Enter amount.
 - Click on create button.
 - Click on approved button.
- Fig. Team Manager SCB Target

4) Team Manager Salary Type – Non -Target

- When user complete the target then salary will as it is.
- If user achieve target more than He/She get assigned then salary as per team manager excel sheet format and salary type non target.

PL TME Incentive slab -

- Click on incentive icon whose designation is PL TME
- **Cross Sell** - PL TME will get amount of cross sell of per card.
- For calculation, Enter per card amount and click the Update button.
- Approved this by superadmin.

The screenshot shows a user interface for managing cross-sell amounts. At the top, the title 'Cross sell' is displayed in blue. Below the title, there is a text input field labeled 'Per Card Amount *' with the value '100' entered. To the right of the input field are two buttons: a white 'Update' button and a dark blue 'Approved' button.

Fig.PL TME Cross Sell

- **Personal Loan Incentive slab -**
- Enter from amount and To Amount fields.
- Enter percentage field.
- Click on the Create button.
- Superadmin will approved the personal loan incentive slab.

Personal Loan Incentive Slab:

Approved
From Amount From Amount *
To Amount To Amount *
Percentage Percentage *

Create
Clear

Sr. No.	From Amount	To Amount	Percentage	Created Date	Last Edited By	Last Updated Date	Operation
1	100000	800000	3%	30-12-2019 11:02:AM	Somnath-1001	30-12-2019 11:02:AM	
2	800001	1600000	4%	30-12-2019 11:03:AM	Somnath-1001	30-12-2019 11:03:AM	

Fig. Personal Loan incentive slab

PL Team Manager incentive -

- Click on incentive icon whose designation is **PL Team Manager**
- Enter collection for team.
- Enter self lead
- Click on the Update button
- Approved by superadmin(Incentive will be calculated automatically in payroll module,Once its approved by superadmin)

Personal Loan Incentive For PL Team Manager

Approved

TEAM COLLECTION * 10 %

SELF LEAD * 1 %

Update

Fig. PL Team Manager Incentive slab

Product Head incentive -

Click on incentive icon in employee master whose designation is **Product Head**

- Enter collection for team.
- Click on the Update button
- Approved by superadmin(incentive will be calculated automatically in payroll module,Once its approved by superadmin)

Personal Loan Incentive For Product Head

Approved

TEAM COLLECTION * 5 %

Update

Fig.Product head incentive slab

Unit Manager incentive -

- Click on incentive icon in employee master whose designation is Unit Manager
- Open personal loan incentive for unit manager
- Enter team collection
- Enter self lead and click on the update button
- Approved it by superadmin (incentive will be calculated automatically in payroll module,Once its approved by superadmin)

Personal Loan Incentive For Unit Manager

TEAM COLLECTION * 10 % SELF LEAD * 3 %

Approved Update

Fig.PL incentive slab for unit manager

Back Office Executive Incentive -

Click on incentive icon in employee master whose designation is **back office executive**

- Open personal loan incentive for Back office executive.
- Enter **From** amount field.
- Enter **To** amount and percentage and click on the create button.
- Approved it by superadmin (incentive will be calculated automatically in payroll module,Once its approved by superadmin)

Personal Loan Incentive Slab:

From Amount From Amount * To Amount To Amount * Percentage Percentage *

Create Clear

Sr. No.	From Amount	To Amount	Percentage	Created Date	Last Edited By	Last Updated Date	Operation
1	100000	1000000	2%	24-12-2019 10:36:AM	Somnath-1001	24-12-2019 10:36:AM	

Fig.back office executive incentive slab

MIS Executive Incentive -

Click on incentive icon in employee master whose designation is **MIS Executive**

- Open personal loan incentive for MIS Executive.
- Enter **From Amount** field.
- Enter **To Amount** and click on the update button.
- Approved it by superadmin (incentive will be calculated automatically in payroll module, Once its approved by superadmin)

Personal Loan Incentive Slab:								
Approved		From Amount		To Amount		Percentage		
Sr. No.	From Amount	To Amount	Percentage	Created Date	Last Edited By	Last Updated Date	Operation	
1	100000	500000	2%	24-12-2019 12:27:PM	Somnath-1001	24-12-2019 12:27:PM	 	
2	500001	1500000	5%	24-12-2019 12:28:PM	Somnath-1001	24-12-2019 12:28:PM	 	
3	1500001	2500000	6%	24-12-2019 12:28:PM	Somnath-1001	24-12-2019 12:28:PM	 	

Fig.MIS Executive incentive slab

D) Product Head Sub Module -

- Click on Product Head sub module.
- Select product head name from dropdown.
- Select product head members and click on Assign button.
- In table view, you can see all assigned team product members.

Employee Master	Department Master	Designation Master	Product Head	Unit Manager	Team Master ▾	Office Master ▾
Dashboard >Assign Member To Product Head						
■ Already assigned to someone. ■ Not Assigned. <input type="text" value="Search"/>						
Product Head Name *	Product Head Member *		<input type="button" value="Assign"/>			
Sr.No.	Department Name	Product Head Name	Product Head Member			
1	Personal Loan	saumya sharma	MONIKA SAHANE			
2	Personal Loan	Manasi M	Sandeep s			
3	Personal Loan	Ranveer R	Rahul R			
4	Personal Loan	sapna d	Sanket s			
5	Personal Loan	sapna d	Neha Patil			

Fig.Product Head

E) Unit Manager Sub Module -

- Click on Unit manager sub module
- Select Unit manager name from dropdown
- Select unit manager members and click on Assign button
- In table view, you can see all assigned team product members.

The screenshot shows a software interface with a top navigation bar containing links: Employee Master, Department Master, Designation Master, Product Head, Unit Manager (highlighted in teal), Team Master ▾, and Office Ma. Below the navigation is a breadcrumb trail: Dashboard > Assign Member To Unit Manager. A legend indicates: ■ Already assigned to someone. ■ Not Assigned. On the right is a search bar labeled 'Search'. The main area has two dropdown menus: 'Unit Manager Name *' set to 'Neha Patil_433926' and 'Unit Manager Member *' set to 'Sagar s_105, Vaibhav ...'. A large 'Assign' button is below these. Below the buttons is a table with the following data:

Sr.No.	Department Name	Unit Manager Name	Unit Manager Member
1	Personal Loan	Rahul R	Ayush A
2	Personal Loan	MONIKA SAHANE	Silla f
3	Personal Loan	MONIKA SAHANE	Adity sharma
4	Personal Loan	MONIKA SAHANE	Asha Sanap
5	Personal Loan	Rahul R	Reshma R

Fig.Unit Manager

D) Team Master

- Click on team master.

1. Add Team Lead

- Click on add team lead.
- Select department.
- Select user.
- Click on the add button.
- After adding team lead it will show in the team lead table.
- Click on the delete operation to delete the team lead record.

Sr. No.	Team Lead Name	Department Name	Operation
1	KALPANA KENGALE	SALES	
2	TUSHAR BHAMRE	SALES	
3	MUSTAFA SAYYED	pick up	
4	AMOL SALVE	pick up	
5	PRADEEP SOLASKAR	pick up	

Fig. Add Team lead

2. Add Team Member

- Click on add team members.
- Select team lead name.
- Select team member.
- Click on assign button.
- After click on assign button, record will display in the table.
- Table display which team members assign to which team lead.

Sr.No.	Department Name	Team Lead Name	Team Member Name
1	SALES	KALPANA KENGALE	TUSHAR BHAMRE
2	SALES	TUSHAR BHAMRE	DEEPA MANDAL
3	SALES	TUSHAR BHAMRE	RASID AKHTAR
4	pick up	AMOL SALVE	Divya sdafe
5	Sample	Asif Shaikh	Monika Sahane

Fig. Assign Team member

- **Expense**

- Click on expense module.
- Only account and admin can add expense details.
- Super admin can only approve and reject the expense.

A) Expense Master

- Click on expense master.
- Click on add expense button.
- Select team lead name.
- Enter expense name.
- Select date.
- Select expense category - **First user need to add expense category from second sub module expense category.**
 - Enter vendor name.
 - Enter invoice number.
 - Select mode of payment.
 - Enter amount.

- Enter CGST.
- Enter SGST.
- Enter IGST.
- Select process.
- Select office location.
- Select sub office.
- Enter comments – **not mandatory**

Note: * indicates all fields are mandatory

- Select process.
- Click on create button.

Dashboard >Expense Master >Expense Form

Team Lead Name	Team Lead Name	Expense Name	Expense Name *
Date	Choose a date *	Expense Category	Select Category *
Vendor Name	Vendor Name *	Invoice Number	Invoice Number *
Mode of Payment	Mode of Payment *	Amount	Amount *
CGST	CGST	SGST	SGST
IGST	IGST	Process	Process *
Office Location	Location *	Sub Office	Sub Office *
Comments	Comments	➡ Create Cancel	

Fig. Expense form

- After click on create button expense record will show in the table.

Expense Master		Report	Expense Category	Expense Graph			
Dashboard >Expense Master							
Add Expense Search							
Sr. No.	Team Lead	Category	Expense Name	Amount	State	Operation	
1	YASMIN SHAIKH	M EXP	COURIER CHGS	2000	PENDING		
2	MUSTAFA SAYYED	SALARY .	SALARY (OCT -18)	9450	PENDING		
3	Asif Shaikh	SALARY .	SALARY (OCT-18)	20520	PENDING		
4	MUSTAFA SAYYED	SALARY .	SALARY (OCT-18)	8850	PENDING		
5	MUSTAFA SAYYED	SALARY .	SALARY (OCT-18)	8050	PENDING		

Fig. Expense Master Table

- Click on edit operation if user wants to edit expense details.
- Click on the delete operation if user wants to delete expense details.
- In expense master table expense status column is present.
- **Status :**

1. Pending

- When user added expense that time expense status will be pending.

2. Approved

- When super admin approve the expense then status will be approved.

3. Rejected

- When super admin reject the expense then status will be rejected.

Expense Master		Report	Expense Category	Expense Graph			
Dashboard >Expense Master							
Search							
Sr. No.	Team Lead	Category	Expense Name	Amount	State	Operation	
1	YASMIN SHAIKH	M EXP	COURIER CHGS	2000	PENDING		
2	MUSTAFA SAYYED	SALARY .	SALARY (OCT -18)	9450	PENDING		
3	Asif Shaikh	SALARY .	SALARY (OCT-18)	20520	PENDING		
4	MUSTAFA SAYYED	SALARY .	SALARY (OCT-18)	8850	PENDING		
5	MUSTAFA SAYYED	SALARY .	SALARY (OCT-18)	8050	PENDING		

Fig. Super admin expense master

B) Expense Category

- Click on add expense category sub module.
- Click on the add category button.
- Enter category name.
- Click on create button.

Expense Master Report Expense Category Expense Graph

Dashboard >Expense Category >Expense Category Form

Category Name :
Gift

Create Cancel

Fig. Expense Category

- After click on create button expense category will show in the table.
- If user wants to edit expense category name then click on edit operation.
- After that edit category name and click on the update button.
- If user doesn't want to update category name then click on cancel button.
- Click on the delete operation if want to delete category name.

Expense Master Report Expense Category Expense Graph

Dashboard >Expense Category

Add Category

Sr. No.	Category Name	Operation
1	M EXP	➡️ / ⚡ / ⚡️
2	RECEIPT	➡️ / ⚡
3	TRAVELLING EXP.	➡️ / ⚡
4	GIFT	➡️ / ⚡
5	PAYOUT	➡️ / ⚡

Fig. Expense category table

C) Report

- Click on report sub module.
- Expense report will display in this module.
- User can search record by selecting team lead name, department, date from, To date, location and process.
- Click on the search button it will display record related to search.
- Clear button is for clear the fields which user selected.
- Click on export report button – User will able to see expense report in excel sheet format.

Date	Team Lead	Department Name	Category	Expense Name	Mode of Payment	Account No.	Cheque No.
Nov 14, 2018	Asif Shaikh	Sample	SALARY .	SALARY	CHEQUE	HDFC-50200025894510	000014
Nov 13, 2018	Asif Shaikh	Sample	SALARY .	SALARY	CHEQUE	ICICI-000505601375	001326

Fig. Expense Report

D) Expense Graph

- Click on expense graph sub module.
- Graph will be display.
- Choose date from.
- Choose date to.
- Click on the search button.
- Graph display record related to that search.
- Clear button clear the date.

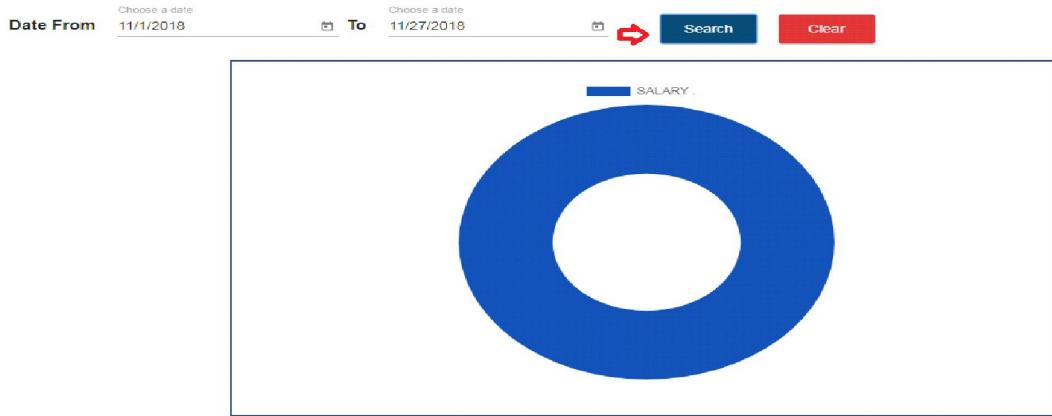


Fig. Expense Graph

6. Attendance

Note: 1. Need biometric device

2. User's login should be present in biometric device with same employee id and password.
3. To view daily attendance , Hierarchy should be like Product head -> Unit manager -> Team Lead ->Team member.

1. Daily Attendance

- Click on attendance module.
- Attendance table will display.
- Product head name field will present in daily attendance.
- Total column display a count of how many members has to that product head.
- When user punching in biometric device it will display in office column and also in view attendance present column.
- When user punching out in biometric device it will display in Out office column and also in view attendance absent column.
- When users punch in biometric,multiple times then entry will be shown in attendance master table.
- Total column shows count according to In office and Out office column entry.



Daily Attendance Attendance Master Holiday Master

ashboard >Daily Attendance Search

City	Select	Pune - Erandwane	Search	Today's Present Employee's : 0	Today's Absent Employee's : 119
Sr.No.	Product Head Name	In Office	Out Office	Total	Operation
1	sapna d	0	2	2	
2	Ranveer R	0	1	1	
3	Manasi M	0	1	1	
4	saumya sharma	0	1	1	

Fig. Product head attendance view



Daily Attendance Attendance Master Holiday Master

Dashboard >Daily Attendance Search

Back

Sr.No.	Unit Manager Name	City	In Office	Out Office	Total	Operation
1	Sanket s	Pune	0	6	6	
2	Neha Patil	mumbai	0	3	3	

Items per page: 5 1 - 2 of 2 |< < > >|

Fig.Unit manager attendance view



Daily Attendance Attendance Master Holiday Master

Dashboard >Daily Attendance Search

Back

Sr.No.	Team Lead Name	City	In Office	Out Office	Total	Operation
1	Sujata s	Pune	0	5	5	
2	Sujay s	Pune	0	0	0	
3	Anika A	Nagpur	0	2	2	

Items per page: 5 1 - 3 of 3 |< < > >|

Fig.Team Lead attendance view

The screenshot shows a table titled 'Present' and 'Absent'. The 'Present' section is empty. The 'Absent' section lists five users: Sandhya d, Samata s, Samar S, Karan K, and Sayali S.

Present	Absent
-	Sandhya d
-	Samata s
-	Samar S
-	Karan K
-	Sayali S

Items per page: 5 | < | < | > | >|

Fig.Present and absent View Attendance

2. Attendance Master -

- Click on attendance master.
- Attendance master table will show all users details.
- Click on view details operation.

The screenshot shows a table with columns: Sr. No., Employee Code, Employee Name, Department, Office Location, and Operation. The table lists five employees: Meghana M, Ayush A, Aishwary Nair, Adity Kunar, and Gauri G, all from the Personal Loan department in Mumbai. There are dropdown menus for Month (January), Year (2020), and City (Pune - Erandwane). An 'Export Attendance' button is also visible.

Sr. No.	Employee Code	Employee Name	Department	Office Location	Operation
1	801	Meghana M	Personal Loan	Mumbai	
2	412	Ayush A	Personal Loan	Mumbai	
3	163	Aishwary Nair	Personal Loan	chennai	
4	7845	Adity Kunar	Personal Loan	chennai	
5	411	Gauri G	Personal Loan	Mumbai	

Fig. Attendance Master

Daily Attendance Attendance Master Holiday Master

Dashboard > Attendance Master > Attendance Report

Add Search Clear

Sr. No.	Employee Code	Employee Name	In Time	Out Time	Arrival Time	Departure Time	Date	Edited By	Edited Date	Operation

Choose a date
1/1/2020 To Choose a date
1/4/2020

Search Clear

Items per page: 5 0 of 0 |< < > >|

Daily Attendance Attendance Master

Dashboard > Attendance Master > Attendance Report > Attendance Form

Arrival Time	HH * <input type="text"/>	MM * <input type="text"/>	Departure Time	HH * <input type="text"/>	MM * <input type="text"/>
Arrival Date	Choose a date * <input type="text"/>	<input type="button" value=""/>	Departure Date	Choose a date * <input type="text"/>	<input type="button" value=""/>

→ Create Cancel

Fig. Attendance Form

- Click on the add button.
- If user wants to add attendance manually then click on the add button.
- Select arrival time.
- Select departure time.
- Select arrival date.
- Select departure date.
- Click on create button.
- After click on create button record will be displayed in attendance master table.
- If user wants to edit particular record then click on edit operation and edit details and click on the update button.

Daily Attendance Attendance Master Holiday Master

Dashboard > Attendance Master > Attendance Report > Attendance Form

Arrival Time HH: 11 MM: 00 AM/PM: AM	Departure Time HH: 10 MM: 00 AM/PM: PM
Arrival Date Choose a date: 12/27/2019 <input type="button" value="Edit"/>	Departure Date Choose a date: 12/27/2019 <input type="button" value="Edit"/>
Last Edited by: Somnath Shevate	
<input style="background-color: #0070C0; color: white; border-radius: 5px; padding: 5px 10px; margin-right: 10px;" type="button" value="Update"/> <input style="background-color: red; color: white; border-radius: 5px; padding: 5px 10px;" type="button" value="Cancel"/>	

3. Holiday Master-

Daily Attendance Attendance Master **Holiday Master**

Dashboard > Attendance Master > Holiday Master

Holiday Manager : Date : <input type="text" value="1/6/2020"/> <input type="button" value="Edit"/> Day : Monday	Reason : <input type="text" value="Holiday Reason"/>	<input type="text" value="Search"/>					
Location : <input type="text" value="Select Location"/>	<input style="background-color: #0070C0; color: white; border-radius: 5px; padding: 5px 10px;" type="button" value="Add"/> <input style="background-color: red; color: white; border-radius: 5px; padding: 5px 10px;" type="button" value="Clear"/>						
Holiday Master : Date From: <input type="text" value="1/1/2020"/> <input type="button" value="Edit"/> To: <input type="text" value="1/6/2020"/> <input type="button" value="Edit"/> Location: <input type="text" value="Select Location"/>							
<input style="background-color: #0070C0; color: white; border-radius: 5px; padding: 5px 10px;" type="button" value="Search"/> <input style="background-color: red; color: white; border-radius: 5px; padding: 5px 10px;" type="button" value="Clear"/>							
Sr. No.	Date	Day	Reason	Location	Last Updated By	Last Updated On	Operation
1	05-01-20	Sunday	S	Pune - Erandwane			<input checked="" type="button" value=""/>

In Holiday Master, there is holiday manager, user is able to add holidays. To add holidays follow below steps: -

- Choose Date
- Day get auto generated
- Enter reason
- Select Location
- Click on Add button
- Added holidays displayed in Holiday master table
- User is able to see holidays location wise by using search functionality.
 - Select Date from
 - Select date to
 - Select Location
 - Click on Search
 - Now you can see the all holidays of selected date and location.
- If you add holiday, holiday is enable, in operation column icon is blue and at right side. In case holiday get cancel then you click on that icon then holiday get disabled, icon get white and shift in left

7. MIS

- Click on MIS module.

a) Card Master

- Click on card master sub module.
- Click on add button.
- Select bank name.
- Enter card type.
- Enter CSA card points.
- Enter logo – **For ICICI bank**
- Click on create button.

Card Master

Dashboard > MIS Dashboard > Card Master > Card form

Bank Name: Bank Name * ▾

Card Type: Card Type * ▾

CSA Card Points: CSA Card Points * ▾

Create

Cancel

Fig. Card Master

- After click on create button cards details show in the card master table.
- If user wants to edit card details then click on edit operation.
- After that edit card details and click on update button.
- If user wants to delete card details then click on delete operation.

Sr. No.	Logo	Bank Name	Card Type	CSA Card Points	Operation
1	-	RBL	SHOPRITE	1	
2	-	RBL	TITANIUM DELIGHT	1	
3	-	RBL	PLATINUM DELIGHT	1	
4	-	RBL	PLATINUM MAXIMA	1	
5	-	RBL	ICON	1	

Fig. Card Master Table

b) Lead Sheet

- Before filling the lead sheet form, add user with designation pick up executive and TME in configuration module.
- After that fill the lead sheet form with that pick up executive and TME names.

Note: CSA Name = TME Name

- Click on add lead button.

• Application number field will disable. Once pickup executive collect all documents to that particular user through the app then application number will be auto generated.

- Select date.

- Select time HH: MM.

- Select pick up executive name.

- Select CSA Name.

- **Customer Details**

- Enter customer name.

- Enter mobile number – **Enter only 10 digits**

- Enter appointment address.

- Select office or residence.

- Enter landmark.
- Enter designation.
- Enter company name.
- Enter company area.
- Enter gross salary.
- Enter net salary.
- Enter office number - **not mandatory**
- Enter residential area.

Lead Master

ashboard > MIS Dashboard > Lead Master > Lead Sheet Form

Application Number	Application Number	Date	Choose a Date * <input type="button" value=""/>	Time	HH * <input type="button" value=""/>	MM * <input type="button" value=""/>
Pickup Name	Pickup executive Name * <input type="button" value=""/>	CSA Name	CSA Name * <input type="button" value=""/>			
Customer Details :						
Customer Name	Name of Customer * <input type="text"/>	Mobile No	Mobile No * <input type="text"/>			
Appointment Address	Address * <input type="text"/>	<input type="radio"/> Office	<input type="radio"/> Residence			
Land Mark	Land Mark * <input type="text"/>	Designation	Designation * <input type="text"/>			
Company Name	Company Name * <input type="text"/>	Company Area	Company Area * <input type="text"/>			
Gross Salary	Gross Salary * <input type="text"/>	Net Salary	Net Salary * <input type="text"/>			
Office No	Office No <input type="text"/>	Residential Area	Residential Area * <input type="text"/>			

Fig. Lead sheet Form1

● Document Area

- Enter salary account bank name
- Select photo or visiting card
- Select ID proof
 - Pan card
 - Adhar card
 - Passport
 - Company ID

- Driving license
- Voter Id
- Select Address proof
 - Voter Id
 - Passport
 - Passbook
 - Adhar card
 - Electricity bill
 - Mobile bill
 - Index II
 - Gas receipt
 - Telephone bill
 - Driving licenses
 - Gas passbook
 - Registered rent agreement
 - Select bank statement(months)
 - Company letterhead
- Income proof
 - Salary slip(months)
 - Bank statement
 - ITR SET
 - Credit card statement
- Others
 - PL agreement
 - Cheque
 - Cancel cheque

Document Area :

Salary A/c Bank Name	Name *	<input type="text"/>	<input type="checkbox"/> Photo	<input type="checkbox"/> Visiting Card		
ID Proof	<input type="checkbox"/> Pan Card	<input type="checkbox"/> Aadhar Card	<input type="checkbox"/> Passport	<input type="checkbox"/> Company ID	<input type="checkbox"/> Driving License	<input type="checkbox"/> Voter ID
Address Proof	<input type="checkbox"/> Voter ID <input type="checkbox"/> Passport <input type="checkbox"/> Passbook <input type="checkbox"/> Aadhar Card <input type="checkbox"/> Electricity Bill <input type="checkbox"/> Mobile Bill <input type="checkbox"/> Index II <input type="checkbox"/> Gas Receipt <input type="checkbox"/> Telephone Bill <input type="checkbox"/> Driving Licences <input type="checkbox"/> Gas Passbook <input type="checkbox"/> Registered Rent Agreement Bank Statement (Months) <input type="button" value="Select"/> <input type="checkbox"/> Company Letter Head					
Income Proof	Salary Slip (Months)	<input type="button" value="Select"/>	Bank Statement (Months)	<input type="button" value="Select"/>	<input type="checkbox"/> ITR SET	
Others	<input type="checkbox"/> PI Agreement <input type="checkbox"/> Cheque <input type="checkbox"/> Cancel Cheque <input type="checkbox"/> Credit Card Statement					

Fig. Lead sheet Form2

• Card Type

- Select bank name
- Select card type

Card Type :

Bank Name	<input type="text"/> Bank Name *	<input type="text"/> Card Type	<input type="text"/> Card Type *
 <input type="button" value="Create"/> <input type="button" value="Cancel"/>			

Fig. Lead sheet Form3

- Click on create button.
- After click on create button, customer details display in the app to that particular pick up executive which TME selected while filling this lead sheet form.

App

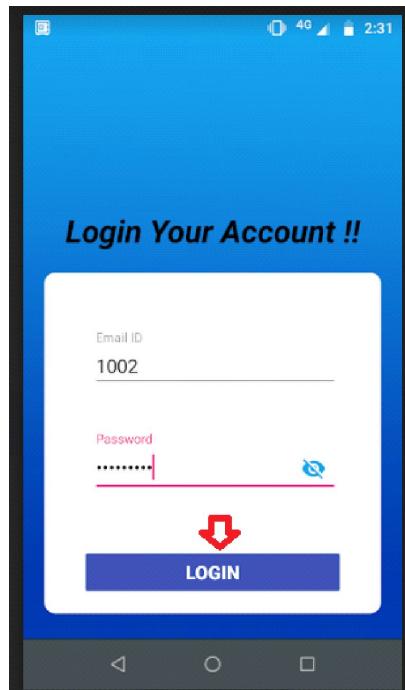


Fig. App Login

- When pick up executive login the app he/ she is able to see profile details by clicking on profile tab.



Fig. App Profile

- Click on task tab.

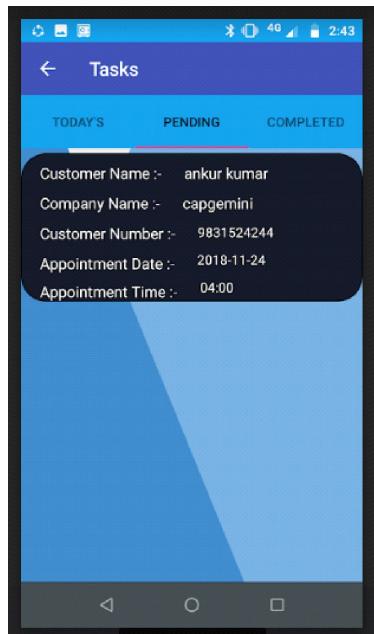


Fig. App task

- Click on pending sub tab.
- Click on customer name.
- Enter employee Id.
- Click on next

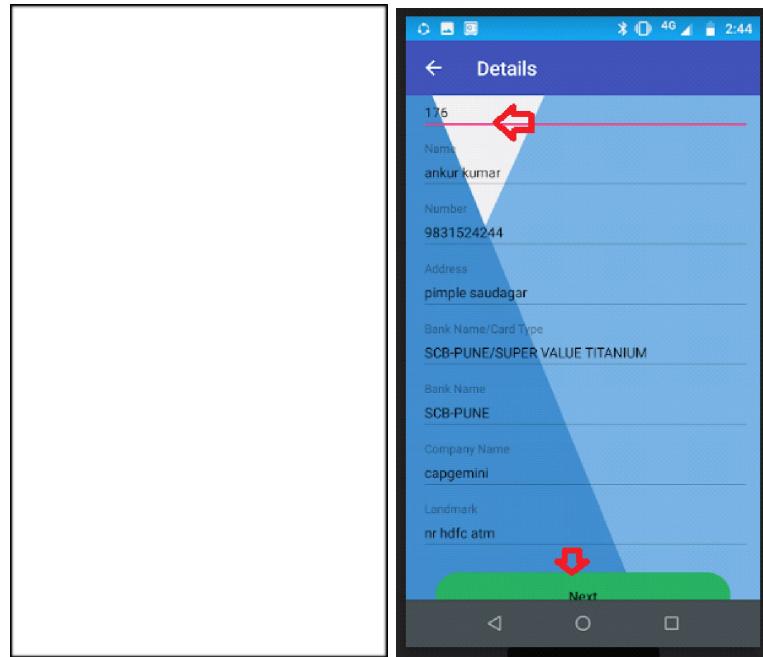


Fig. APP Customer Details

- Select documents.
- Click on Id proof, address proof, income proof and others proof.
- Select documents and click on save button.

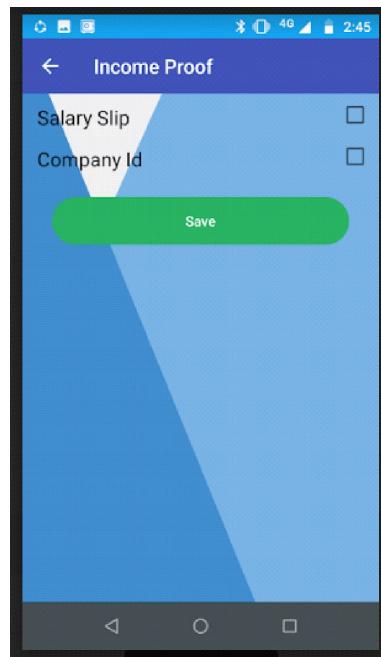


Fig. App documents proof

- Click on submit button.

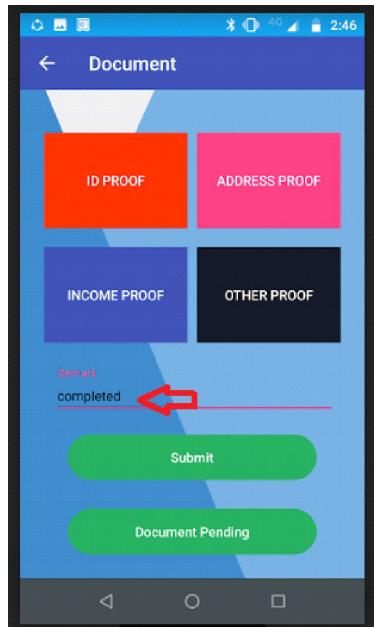


Fig. submit button

- Click on completed tab – all completed customer details display

Self

- Click on self tab – If pick up executive wants to add self customer details
- Enter application number.
- Enter name.
- Enter number.
- Enter address.
- Select bank name/card type.
- Enter company name.
- Click on submit.

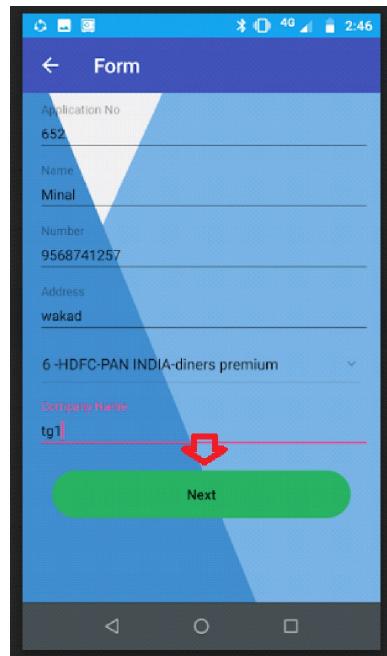


Fig. App Self form

- Click on ID proof – Select documents
- Click on save.
- Click on address proof – Select documents
- Click on save.
- Click on income proof – Select documents
- Click on save.
- Click on other proof – Select documents
- Click on save.

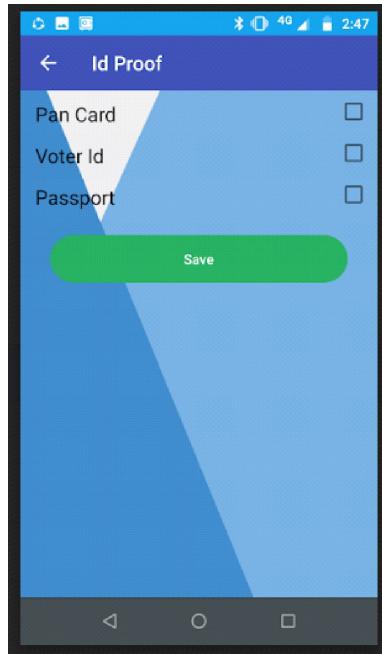
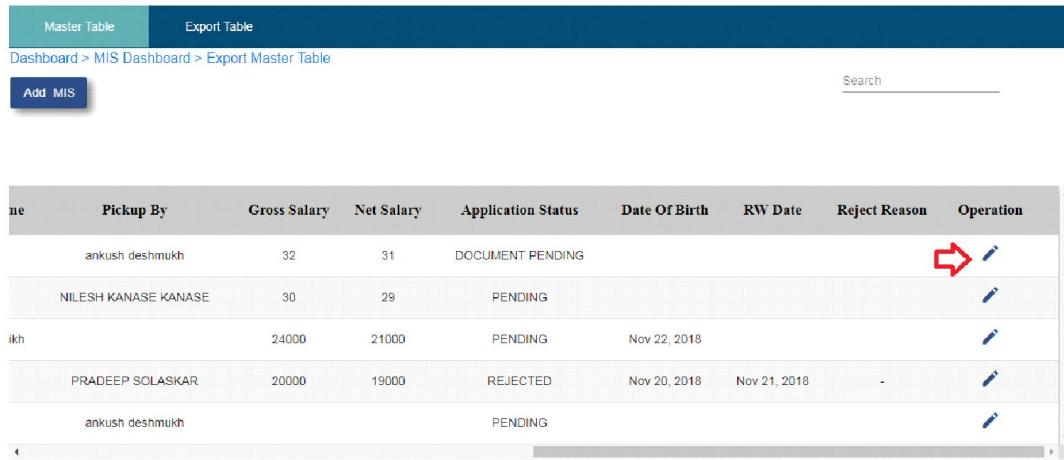


Fig. App Self Income proof

- Enter remark – not mandatory
- Click on submit button – After that record display in export master table
- Click on logout button.

C) Credit Card MIS Export

- Click on credit card MIS export sub module.
- **Master Table**
 - Click on credit card MIS export.
 - Click on edit operation.



The screenshot shows a web-based application interface for managing a master table. At the top, there are two tabs: 'Master Table' (selected) and 'Export Table'. Below the tabs, the URL 'Dashboard > MIS Dashboard > Export Master Table' is visible. On the right side, there is a search bar labeled 'Search'. A blue button labeled 'Add MIS' is located at the top left. The main content area displays a table with the following columns: Name, Pickup By, Gross Salary, Net Salary, Application Status, Date Of Birth, RW Date, Reject Reason, and Operation. The 'Operation' column contains edit icons (pens). A red arrow highlights the 'Operation' column header.

Name	Pickup By	Gross Salary	Net Salary	Application Status	Date Of Birth	RW Date	Reject Reason	Operation
ankush deshmukh		32	31	DOCUMENT PENDING				
NILESH KANASE KANASE		30	29	PENDING				
ikh		24000	21000	PENDING	Nov 22, 2018			
PRADEEP SOLASKAR		20000	19000	REJECTED	Nov 20, 2018	Nov 21, 2018	-	
ankush deshmukh				PENDING				

Fig. Export Master Table Edit

- Enter all enable and mandatory fields.
- Select verify by field.
- Select check by field.
- Select fill up by field.
- Select application status :
 1. STB – Record display in export table
 2. Pending – Record display in master table
 3. Document pending – Record display in master table
 4. Rejected – Record display in master table

Ext Number	Ext Number	Office Email Id	Office Email Id	Gross Salary (Monthly)	32
Net Salary (Monthly)	Net Salary 31	Salary Account Bank	Salary Account Bank HDFC	RW Date	Choose a date * <input type="button" value="Calendar"/>
REF-1 Name	REF-1 Name	REF-1 Mobile No.	REF-1 Mobile No.	REF-1 Company	REF-1 Company
REF-2 Name	REF-2 Name	REF-2 Mobile No.	REF-2 Mobile No.	REF-2 Company	REF-2 Company
DME ID	Select DME ID	Lead Generated By	Select Name NEELAM MORE	TL Name	Select TL Name
Bank Name	Bank name YES	Pickup By	Select Pickup By ankush deshmukh	Activity Code	Activity Code
Remark	Remark docs pen	Verify By	Verify By *	Check By	Check By * <input type="button" value="Down"/>
Fillup By	Fillup By * <input type="button" value="Down"/>	Bar Code	Bar Code	Application Status	Select Application Status DOCUMENT PENDING <input type="button" value="Down"/>
Reject Reason	Reject Reason	<input type="button" value="Submit"/> <input type="button" value="Back"/>			

Fig. MIS Export Master Form

- **Export Table**

- Click on view details operation – Customer details display
- Select date from date, date to and bank name.
- Click on search button.
- Click on export report – Report display into the excel sheet format

Master Table	Export Table					
Dashboard > MIS Dashboard > Export Table						
Search _____						
Export Report						
Date From	Choose a date	To	Choose a date	Bank Name		
				Select _____		
					Search Clear	
STB Date	Application No	Customer Name	Bank Name	Company Name	Card Type	Lead Generated By
Nov 26, 2018	12345	ABC	ICICI-PUNE	SOL	JET TITANIUM	saima shaikh
Nov 26, 2018	123456789	sss	ICICI-PUNE	sss	JET TITANIUM	saima shaikh

Fig. Export Table

- **Remaining Master Table**

- Click on add MIS button.
- Before filling this form add user with designation FOS in configuration module.

Master Table	Export Table					
Dashboard > MIS Dashboard > Export Master Table						
Search _____						
Add MIS 						
Application No	Customer Name	Bank Name	Company Name	Card Type	Lead Generated By	TL Name
null1234	SAGAR SHINGADE	YES	AGRO	REWARDS PLUS	NEELAM MORE	
YBLE699377 YBLE699378	somnath machorkar	YES	kent intelligent transport lld	REWARDS PLUS	ASHWINI DASARI	
123456	PRIYANKA	ICICI-PUNE	TATA CONSULTANCY LTD	PLATINUM CHIP	Fairhana Taj	Asif Sha
null12345	a	HDFC-PAN INDIA	z	JET PLATINUM	ASHWINI DASARI	

Fig. Add MIS

- Enter application number.
- Select bank name.
- Select card type.
- Select lead generated by.
- Select pick up date.
- Enter customer name.

- Enter personal email id.
- Enter present address.
- Enter mobile number.
- Enter P add contact number. –Not mandatory
- Select marital status.
- Select date of birth.
- Enter education.
- Enter PAN number.
- Enter company category.
- Enter company name.
- Enter company code.
- Enter office landline number – Not mandatory
- Enter Ext number – Not mandatory
- Enter office email id – not mandatory
- Enter gross salary(monthly)
- Enter net salary(monthly)
- Enter adhar number
- Enter salary account bank.
- Select RW date.
- Enter REF -1 name.
- Enter REF – 1 mobile number.
- Enter REF – 1 Company.
- Enter REF - 2 name.
- Enter REF – 2 mobile number.
- Enter REF – 2 Company.
- Enter activity code.
- Enter remark.
- Enter bar code.

- Click on submit button.

[Master Table](#)
 [Export Table](#)

Dashboard > MIS Dashboard > Export Master Table > Export Master Form

Application Number	<input type="text" value="Application number *"/>	Bank Name	<input type="text" value="Bank Name *"/>	Card Type	<input type="text" value="Card Type *"/>
Lead Generated By	<input type="text" value="Select Lead Generated..."/>	Pickup Date	<input type="text" value="Choose a date *"/>	Customer Name	<input type="text" value="Customer name *"/>
Personal Email Id	<input type="text" value="Personal Email Id *"/>	Present Address	<input type="text" value="Present Address *"/>	Mobile Number	<input type="text" value="Mobile number *"/>
P Add Contact No.	<input type="text" value="P Add Contact No. *"/>	Marital Status	<input type="text" value="Marital Status *"/>	Date Of Birth	<input type="text" value="Choose a date *"/>
Education	<input type="text" value="Education *"/>	PAN Number	<input type="text" value="PAN Number *"/>	Aadhar Number	<input type="text" value="Aadhar Number *"/>
Company Name	<input type="text" value="Company Name *"/>	Company Code	<input type="text" value="Company Code *"/>	Company Category	<input type="text" value="Company Category *"/>
Office Landline No.	<input type="text" value="Office Landline No. *"/>	Ext Number	<input type="text" value="Ext Number"/>	Office Email Id	<input type="text" value="Office Email Id"/>
Gross Salary (Monthly)	<input type="text" value="Gross Salary *"/>	Net Salary (Monthly)	<input type="text" value="Net Salary *"/>	Salary Account Bank	<input type="text" value="Salary Account Bank *"/>
RW Date	<input type="text" value="Choose a date"/>	REF-1 Name	<input type="text" value="REF-1 Name"/>	REF-1 Mobile No.	<input type="text" value="REF-1 Mobile No."/>
REF-1 Company	<input type="text" value="REF-1 Company"/>	REF-2 Name	<input type="text" value="REF-2 Name"/>	REF-2 Mobile No.	<input type="text" value="REF-2 Mobile No."/>
REF-2 Company	<input type="text" value="REF-2 Company"/>	Activity Code	<input type="text" value="Activity Code"/>	Remark	<input type="text" value="Remark"/>
Bar Code	<input type="text" value="Bar Code"/>				
<input style="background-color: #005a99; color: white; border: none; padding: 5px 10px; margin-right: 10px;" type="button" value="Submit"/> <input style="background-color: red; color: white; border: none; padding: 5px 10px;" type="button" value="Back"/>					

Fig. Add MIS Form

- After click on submit button it will show in the master table.
- Click on edit operation.
- Enter all enable and mandatory fields.
- Select verify by.
- Select check by.
- Select application status :
- 1. STB – Record display in export table
- 2. Pending – Record display in master table
- 3. Document pending – Record display in master table
- 4. Rejected – Record display in master table

Net Salary (Monthly)	Net Salary 21000	Salary Account Bank	Salary Account Bank HDFC	RW Date	Choose a date * <input type="text"/>
REF-1 Name	REF-1 Name undefined	REF-1 Mobile No.	REF-1 Mobile No. undefined	REF-1 Company	REF-1 Company undefined
REF-2 Name	REF-2 Name undefined	REF-2 Mobile No.	REF-2 Mobile No. undefined	REF-2 Company	REF-2 Company undefined
DME ID	Select DME ID	Lead Generated By	Select Name Farhana Taj	TL Name	Select TL Name Asif Shaikh
Bank Name	Bank name ICICI-PUANE	Pickup By	Select Pickup By	Activity Code	Activity Code undefined
Remark	Remark undefined	Verify By	Verify By *	Check By	Check By *
Fillup By	Fillup By * ASHWINI DASARI_2771	Bar Code	Bar Code undefined	Application Status	Select Application Status * PENDING
Reject Reason	Reject Reason	<input style="background-color: #005a9c; color: white; padding: 5px 10px; border-radius: 5px; margin-right: 10px;" type="button" value="Submit"/> ↴ <input style="background-color: red; color: white; padding: 5px 10px; border-radius: 5px;" type="button" value="Back"/>			

Fig. Add MIS FOS Edit Form

C) Credit Card MIS Import

- Click on credit card MIS import sub module.

Note: 1. While uploading the excel sheet, file format should be same as bank sent to company.

2. Upload file format should be as follows:

APPLICATION NO	CUSTOMER NAME	Decision Date	Application Status	Rejection Remark	Decline Code	LOGO(CARD TYPE)
----------------	---------------	---------------	--------------------	------------------	--------------	-----------------

3. DIP upload file format should be as follows:

APPLICATION NO	CUSTOMER NAME	Decision Date	DIP Status
----------------	---------------	---------------	------------

4. Decision date in the file must be in "YYYY/MM/DD" format.

5. While uploading booking and DIP ok sheet, file extension must be in .xlsx .

6. Excel sheet converts application number like 00123 to 123 there for it mismatches the application number and particular record go to the error log. So application number should not start from '0'.

5. If application number is greater than 10 then excel sheet will convert it into scientific notation as 1.2408E+12 and which will not matching with application number. So particular record will go to error log. So user need to convert the excel sheet cell into proper format.

1. Upload

- Click on upload tab.



Fig. Import Upload and DIP Upload

- Choose a file.
- Click on upload button.
- Record will show in master table.
- Click on DIP.
- Choose a file.
- Click on DIP upload button.
- Record will show in master table

2. Master Table

- After uploading and DIP uploading the file, records will show in master table.
- Click on date from and date to.
- Select bank name.
- Select status.
- Click on search.
- After click on search button, particular record related to that search will display.

Upload	Master Table	Error log																								
Dashboard > MIS Dashboard > Master Table																										
Date From	Choose a date 11/1/2018	To 11/27/2018																								
Bank Name	Select ICICI-PUNE	Status APPROVED																								
 Search Clear																										
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>STB Date</th><th>Application No</th><th>Customer Name</th><th>Mobile Number</th><th>Company Name</th><th>DME ID</th></tr> </thead> <tbody> <tr> <td>Nov 16, 2018</td><td>12345678909</td><td>A</td><td>9146909090</td><td>M</td><td></td></tr> <tr> <td>Nov 16, 2018</td><td>123456999</td><td>A</td><td>3333333333</td><td>M</td><td></td></tr> <tr> <td>Nov 16, 2018</td><td>4667</td><td>A</td><td>2222222222</td><td>V</td><td></td></tr> </tbody> </table>			STB Date	Application No	Customer Name	Mobile Number	Company Name	DME ID	Nov 16, 2018	12345678909	A	9146909090	M		Nov 16, 2018	123456999	A	3333333333	M		Nov 16, 2018	4667	A	2222222222	V	
STB Date	Application No	Customer Name	Mobile Number	Company Name	DME ID																					
Nov 16, 2018	12345678909	A	9146909090	M																						
Nov 16, 2018	123456999	A	3333333333	M																						
Nov 16, 2018	4667	A	2222222222	V																						

Fig. Import Master table

3. Error Log

- Click on error log.
- If application number mismatches in excel sheet then it will go to error log.
- Select date from and date to.
- Click on search button.
- After click on search button particular record will display.

Upload	Master Table	Error log																		
Dashboard > MIS Dashboard > Error Log																				
Date From	Choose a date 11/17/2018	To 11/20/2018																		
 Search Clear																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Sr. No.</th><th>Application No</th><th>Customer Name</th><th>Decision Date</th><th>DIP Status</th><th>Entry Date</th></tr> </thead> <tbody> <tr> <td>1</td><td>778885421</td><td>samy</td><td>Nov 17. 2018</td><td></td><td>Nov 17. 2018</td></tr> <tr> <td>2</td><td>525263475</td><td>LAZ</td><td>Nov 17. 2018</td><td></td><td>Nov 17. 2018</td></tr> </tbody> </table>			Sr. No.	Application No	Customer Name	Decision Date	DIP Status	Entry Date	1	778885421	samy	Nov 17. 2018		Nov 17. 2018	2	525263475	LAZ	Nov 17. 2018		Nov 17. 2018
Sr. No.	Application No	Customer Name	Decision Date	DIP Status	Entry Date															
1	778885421	samy	Nov 17. 2018		Nov 17. 2018															
2	525263475	LAZ	Nov 17. 2018		Nov 17. 2018															

Fig. Error Log

8. Stock Management

- Click on stock management module.

1. Stock Report

- Click on add stock.
- Enter stock item name.
- Select date.
- Enter stock type.
- Enter new purchase.
- Enter amount.
- Click on create button.

Stock Report Assign Stock Return Stock

Dashboard > Stock Report > Form

Stock Item Name	Notepad	Date	Choose a date *
Stock Type	single	New Purchase	New Purchase *
Amount	500	10	
<input type="button" value="Create"/> <input type="button" value="Cancel"/>			

Fig. Add Stock

- After click on create button, record will save in stock report table.
- If user wants to add more stock then click on edit operation.
- Enter new purchase.
- Enter amount.
- Click on update button.

Stock Report Assign Stock Return Stock

Dashboard > Stock Report > Form

Stock Item Name *	HEAD PHONE	Date	Choose a date *
Stock Type *	RD	New Purchase	0
Amount *	0		

Update **Cancel**

Fig. New stock

- If user wants to add same stock again and again then click on edit operation and update there.
- After adding new stock, it will display in stock report table.
- Click on date from, date to and item name.
- Click on search button
- After click on search button, record will be display.

Stock Report Assign Stock Return Stock

Dashboard > Stock Report

Sr.No.	Date	Stock Item Name	Stock Type	Initial Stock Qty	New Purchase	Total Stock	Total Issue	Total Return	Given To C
1	Nov 1, 2018	LUNCH BOX	OPENING STOCK	0	36	36	0	0	0
2	Nov 1, 2018	HEAD PHONE	OPENING	59	0	59	0	0	0

Fig. Search Stock Record

2. Assign Stock

- Click on assign stock sub module.
- Click on add assign button.
- Choose date.
- Select team manager.
- Select employee name.
- Select process.

- Select items.
- Enter quantity.
- Amount will be auto calculate.
- Office will be auto select.
- Sub office will be auto select.
- Select assigned by.
- Enter activity name.
- Click on create button.

Stock Report Assign Stock Return Stock

Dashboard >Assign Stock >Form

Date	Choose a date *	Team Manager	Team Manager *
Employee Name	Employee Name *	Process	Process *
Items	Items *	Quantity	Quantity *
Amount	Amount	Office	Office
Sub Office	Sub Office	Assigned By	Assigned By *
Activity Name * <input type="text"/>			
➡ Create Cancel			

Fig. Assign Stock

- After click on create button record will be display in assign stock table.
- If user wants to see details of assigned stock then click on view details operation.

Stock Report Assign Stock Return Stock

Dashboard >Assign Stock

Add Assign

Date From		To	Choose a date	Search	Clear
<input type="text"/> ➡			<input type="text"/> ➡	Search	Clear

Process	Items	Qty	Amount	Office	Sub-Office	Assigned by	Operation
General	BOTTELS	2	200	PUNE-HEAD OFFICE	BUND GARDEN	Farhana Taj	➡ Delete
General	abc	2	20	PUNE-HEAD OFFICE	BUND GARDEN	Divya sdafwe	Edit Delete

Fig. Assign Stock View Operation

- Click on date from and date to.

- Click on search button.
- After click on search button particular record will display.

The screenshot shows a web-based application interface for managing stock. At the top, there are three tabs: 'Stock Report' (disabled), 'Assign Stock' (selected), and 'Return Stock'. Below the tabs, the URL 'Dashboard >Assign Stock' is visible. The main area contains a search form with fields for 'Date From' (with a red arrow pointing to it) and 'To' (with a red arrow pointing to it), both with dropdown menus labeled 'Choose a date'. To the right of these fields are 'Search' and 'Clear' buttons. A 'Search' button is also located at the bottom of the table. The table has columns: Process, Items, Qty, Amount, Office, Sub-Office, Assigned by, and Operation. Two rows of data are shown:

Process	Items	Qty	Amount	Office	Sub-Office	Assigned by	Operation
General	BOTTLES	2	200	PUNE-HEAD OFFICE	BUND GARDEN	Farhana Taj	
General	abc	2	20	PUNE-HEAD OFFICE	BUND GARDEN	Divya sdaewe	

Fig. Assign Stock search button

3. Return Stock

- Click on return stock sub module.
- Click on return stock button.
- Select employee name.
- Select stock item name.
- Enter return quantity.
- Select return date.
- Select received by.
- Click on submit button.

The screenshot shows a 'Return Stock >Form' page. At the top, there are three tabs: 'Stock Report', 'Assign Stock' (disabled), and 'Return Stock' (selected). Below the tabs, the URL 'Dashboard >Return Stock >Form' is visible. The form contains several input fields: 'Employee Name' (dropdown), 'Stock Item Name' (dropdown), 'Return Quantity' (text input with placeholder '(Quantity In Hand.)'), 'Return Date' (dropdown), 'Received By' (dropdown), and 'Received By' (dropdown). At the bottom right are 'Submit' and 'Cancel' buttons, with a red arrow pointing to the 'Submit' button.

Fig. Return stock

- After click on submit button record will display in return stock table.
- Select date from and date to.
- Click on the searchbutton.
- After click on search button, particular record will be displayed.

The screenshot shows a web-based application interface for managing stock. At the top, there are three tabs: 'Stock Report', 'Assign Stock', and 'Return Stock'. The 'Return Stock' tab is active. Below the tabs, a breadcrumb navigation shows 'Dashboard >Return Stock'. The main area has a title 'Return Stock' with a red arrow pointing down to a date range input field. This field contains 'Choose a date' and two date pickers: '11/14/2018' and '11/21/2018'. To the right of these pickers is a blue 'Search' button with a red arrow pointing down to it, and a red 'Clear' button. Above the search buttons is a search bar with the placeholder 'Search'. Below the search area is a table with the following data:

Sr. No.	Date	Employee Name	Stock Item Name	Return to Admin	Received By
1	Nov 21, 2018	Divya sdafwe_5457	abc	3	Divya sdafwe
2	Nov 15, 2018	YASMIN SHAIKH_2570	tiffin	3	Asir Tamboli
3	Nov 16, 2018	ankush deshmukh_111	vr box	2	ankush deshmukh
4	Nov 14, 2018	Farhana Taj_1002	Headphone(Bose)	1	YASMIN SHAIKH

Fig. Return Stock Search Button

• Stock Report Table

- When user add stock, then stock count show in new purchase column.
- Total stock show total stock quantity.
- Total issue column show how much stock user taken from total stock.
- Total return column show how much stock user returned from total issue stock.
- Given to customer column show how much stock user given to customer from total issue.
- Available stock column show how much stock is available from total stock minus given to customer.

9. Payroll

- Click on payroll module.

1. Advance management

- Click on advance management sub module.
 - Click on add button.

 - Select team lead name.
 - Select employee name.
- Note:** Employee should be team member of any one of the team lead.
- Enter process.
 - Salary type will be auto generated.
 - Enter advance amount.
 - Select issued by.
 - Select date.
 - Enter remark.
 - Click on create button.

Team Lead Name	Team Lead Name *	Employee Name	Employee Name *
Process	Process *	Salary Type	Salary Type
Advance Amount	Advance Amount *	Issued By	Issued By *
Date	Choose a date *	Remark	Remark *

Fig. Advance Report Form

- After click on create button, record will be displayed in the advance report table.
- Click on edit operation.

Location	Salary Type	Advance Amount	Given By	Date	Comment	Operation
PUNE HEAD OFFICE	Target	500	Asir Tamboli	Nov 26, 2018	TRAIL	
PUNE HEAD OFFICE	Non Target	500	MOHINI SHIVALE	Nov 16, 2018	being advance salary paid by cash nov-18	

Fig. Advance Report Edit Operation

- If user wants to edit details then edit it and click on update button.

Team Lead Name	Team Lead Name * YASMIN SHAIKH_2570	Employee Name	Employee Name * LAZEENA SHAIKH_4156
Process	Process * ADMIN	Salary Type	Salary Type Target
Advance Amount	Advance Amount * 500	Issued By	Issued By * Asir Tamboli_1010
Date	Date 11/26/2018	Remark	Remark * TRAIL

Fig. Update Advance Report form

- Click on delete operation.
- If user wants to delete advance record then click on delete operation.
- Select date from and date to.
- Click on search button.
- After click on search button user is able to search the records.

Emp ID	Employee Name	Team Manager Name	Process	Location	Salary Type	Advance Ame
4156	LAZEENA SHAIKH	YASMIN SHAIKH	ADMIN	PUNE HEAD OFFICE	Target	500
4071	DIPAK KASUBE	MUSTAFA SAYYED	pickup	PUNE HEAD OFFICE	Non Target	500

Fig. Advance Report Search Records

2. Prime

- Click on prime sub module.

a. Prime Report

- Note:
1. Name column shows team lead name in bold and TME name.
 2. TME should be a member of team lead and TME should be assigned to any one of the team lead.
 3. ICICI bank declined code – MAR – Status – Multiapproved
 4. SCB bank declined code – SR00 – Status – Multiapproved
 5. Declined code means promo code – It will come from MIS Import master Table
 6. Yes bank column show only DIP and point count.
 7. RBL bank is not present in prime report.
 8. Final DIP count present only for ICICI bank.

- DIP count comes from MIS import master table to that particular record. This count is count of team member DIP count.
- Points will calculate as per card master, which bank will have how much card points according to that.
- Approved count comes from MIS import master table.
- Declined count comes from MIS import master table.
- Total = Approved + Declined

- Percent(%) – Approved/Total

Prime Report									
Dashboard > Payroll Dashboard > Prime Report									
Export Report Search									
Date From	Choose a date 11/1/2018	To	Choose a date 11/29/2018			Search	Clear		
Sr.No	Name	Emp Code	DIP	Points	Approved	Declined	Total	Percent (%)	
1	Asif Shaikh	1001	0	-	0	0	0	0.000	
2	saima shaikh	2100	0	-	0	0	0	0.000	
3	PRADEEP SOLASKAR	3519	0	-	0	0	0	0.000	

Fig. Prime Report

- Total

1. DIP – Total DIP count
2. Points – Total points count
3. Approved – total count of approved
4. Declined – Total count of declined
5. Total – Approved total + Declined total
6. Percent – Approved/ total *100

Prime Report Total										
Export Report Search										
Date From	Choose a date 11/1/2018	To	Choose a date 11/29/2018			Search	Clear			
lined	Total	Percent (%)	DIP	Points	DIP	Points	Approved	Declined	Total	Percent (%)
0	0	0.000	0	-	0	0	0	0	0	0.000
0	0	0.000	0	-	0	0	0	0	0	0.000
0	0	0.000	0	-	0	0	0	0	0	0.000
0	0	0.000	0	-	0	0	0	0	0	0.000
0	0	0.000	0	-	0	0	0	0	0	0.000
0	5	100.000	0	-	0	12.5	5	0	5	100.000

Fig. Prime Report Total

- **Grand Total**

1. Grand total calculate as per column.
2. In grand total only team lead count will be calculated which is display bold in the table.
3. Grand total is addition of all team lead records.

		HDFC									
Sr.No	Name	Emp Code	DIP	Points	Approved	Declined	Total	Percent (%)	DIP	Pe	
1	Asif Shaikh	1001	0 ↪	-	0	0	0	0.000	0		
2	saima shaikh	2100	0	-	0	0	0	0.000	0		
3	PRADEEP SOLASKAR	3519	0 ↪	-	0	0	0	0.000	0		
4	AMOL SALVE	3926	0 ↪	-	0	0	0	0.000	0		
5	MUSTAFA SAYYED	336	0 ↪	-	0	0	0	0.000	0		
6	YASMIN SHAIKH	2570	0 ↪	-	0	0	0	0.000	0		
7	TUSHAR BHAMRE	1752	0 ↪	-	0	0	0	0.000	0		
8	DEEPA MANDAL	1996	0	-	0	0	0	0.000	0		
9	KALPANA KENGALE	3769	0 ↪	-	0	0	0	0.000	0		
10	Grand Total		0 ↪	0	0	0	0	0.000	0		

Fig. Prime Report Grand Total

- Date from and date to display one month record.
- User will able to search date as per month.
- User will able to export prime report in excel sheet format.

Prime Report											
Dashboard > Payroll Dashboard > Prime Report											
Export Report								Search _____			
Date From	Choose a date 11/1/2018	To	Choose a date 11/29/2018					Search	Clear		
Sr.No	Name	Emp Code	DIP	Points	Approved	Declined	Total	Percent (%)	DIP	Po	
1	Asif Shaikh	1001	0	-	0	0	0	0.000	0		
2	saima shaikh	2100	0	-	0	0	0	0.000	0		
3	PRADEEP SOLASKAR	3519	0	-	0	0	0	0.000	0		

Fig. Prime Report Search and Export

2. Payroll Report

- Click on payroll report sub module.
- a. Payroll Master**
 - Click on payroll master tab.
 - Date field show only current month of the records. If user wants to search for another month record then choose another month.
 - Date field show only one month of records.

Payroll Master						
Payroll Report						
Dashboard > Payroll Dashboard > Payroll Master						
Date From	Choose a date 11/1/2018	To	Choose a date 11/29/2018		Search	Clear
Sr.No	Date Of Joining	Employee Code	Employee Name	Department	Designation	
1	Nov 2, 2018	1002	Farhana Taj	Sample	FOS	
2	Jul 8, 2017	2831	ANIKESH KOLHAPURE	pick up	Pick up Executive	
3	Jan 1, 2009	111	ankush deshmukh	pick up	Pick up Executive	

Fig. Payroll Master Search

- Note: 1. In payroll report all employee record will display.
2. If any user completed target then incentive will apply to that user.
 3. So, first super admin need to approve incentive.

Heading	Comment
DOJ	DOJ will come from Employee master
EMPLOYEE CODE	EMPLOYEE CODE
EMP NAME	Source: Employee master
DEPT	Source: Employee master
DESIGNATION	Source: Employee master

The screenshot shows a software interface for managing payroll data. At the top, there are two tabs: "Payroll Master" (selected) and "Payroll Report". Below the tabs, a breadcrumb navigation shows "Dashboard > Payroll Dashboard > Payroll Master". There is a search bar labeled "Search" with a placeholder "Search". Underneath, there are date selection fields for "Date From" (set to 11/1/2018) and "To" (set to 11/29/2018), along with "Search" and "Clear" buttons. The main area displays a table of employee records:

No.	Date Of Joining	Employee Code	Employee Name	Department	Designation
1	Nov 2, 2018	1002	Farhana Taj	Sample	FOC
2	Jul 8, 2017	2831	ANIKESH KOLHAPURE	pick up	Pick up Executive
3	Jan 1, 2009	111	anikush deshmukh	pick up	Pick up Executive
4	Sep 6, 2017	3047	NILESH KANASE KANASE	pick up	Pick up Executive
5	Mar 20, 2017	2587	NABILAL SHAikh	pick up	Pick up Executive

Fig. Payroll Master Table1

Heading	Comment
TEAM MANAGER	Source: Employee master
SALARY TYPE	Fixed, Target, Fixed + Incentives (SOURCE: EMP MASTER)
SALARY ON TARGET	DIP * amount
FIX SALARY (A)	Source: Employee master
SALARY AS PER TARGET	Source: Employee master
PROFESSIONAL TAX	SALARY IS > 5000 AND < 10000 THEN PT SHOULD BE 175, AND SALARY IS > 10000 THEN PTY SHOULD BE 200

Payroll Master		Payroll Report							
Dashboard > Payroll Dashboard > Payroll Master									
Search _____									
Date From	Choose a date 11/1/2018	To	Choose a date 11/29/2018	Search	Clear				
Team Manager	Salary Type	Salary On Target	Fix Salary	Salary As Per Target	Professional Tax				
Asif Shaikh	Non Target	0	0	0	0				
MUSTAFA SAYYED	Non Target	0	0	0	0				
MUSTAFA SAYYED	Non Target	0	0	0	0				
MUSTAFA SAYYED	Non Target	0	0	0	0				
MUSTAFA SAYYED	Non Target	0	0	0	0				

Fig. Payroll Master Table2

Heading	Comment
Salary after professional tax	(Fix salary - Professional Tax)
Basic Salary	40% of Gross/Fix salary
Per day Salary	(salary after PT/30)
CARDS DIP	Source: Prime report
STB	Source: Prime report
APPROVED	Source: Prime report
DECLINED	Source: Prime report
TOTAL	Source: Prime report

Payroll Master	Payroll Report						
Dashboard >Payroll Dashboard>Payroll Master							
Search _____							
Date From	Choose a date 11/1/2018						
To	Choose a date 11/29/2018						
	<input type="button" value="Search"/> <input type="button" value="Clear"/>						
Salary After Professional Tax	Basic Salary	Per Day Salary	Card's Dip	STB	Approved	Declined	Total
0	0.00	0.00	0	0	0	0	0
0	0.00	0.00	0	0	0	0	0
0	0.00	0.00	0	0	0	0	0
0	0.00	0.00	0	0	0	0	0

Fig. Payroll Master Table3

Heading	Comment
PERCENTAGE	Source: Prime report
TOTAL POINTS	Source: Prime report
INCENTIVE (B)	(total points * amount (source: points/value master))
Total Salary	(A+B+C) Fix salary + Incentives
PRESENT	Source: Attendance module
ABSENT	Source: Attendance module
LATE MARKS	Source: Attendance module
LATE MARKS-ABS	(Late marks / 3)

Payroll Master	Payroll Report						
Dashboard > Payroll Dashboard > Payroll Master							
Search _____							
Date From	Choose a date 11/1/2018						
To	Choose a date 11/29/2018						
	<input type="button" value="Search"/> <input type="button" value="Clear"/>						
Percentage	Total Points	Incentive	Total Salary	Present	Absent	Late Mark	Late Mark Absent
-	-	-	0	1	28	1	0.00
-	-	0	0	0	30	0	0.00
-	-	0	0	3	27	2	0.00
-	-	0	0	2	28	0	0.00
-	-	0	0	3	27	1	0.00

Fig. Payroll Master Table 4

Heading	Comment
LATE MARKS DED (b)	(late marks ABS * per day salary)
ADVANCES (f)	Source: Advance module
P.F AMOUNT (c)	12% of basic salary
GIFT DEDUCTIONS (d)	Stock module
ABSENT CUTTING (e)	(absent-UA Absent) * per day salary)
DEDUCTION	(a+ b+ c+ d+ e+ f) (UA ABS deduction + late marks deduction + advances + PF amount + Gift deduction + Absent cutting
NET SAL	(total salary - deductions)

Payroll Master	Payroll Report					
Dashboard > Payroll Dashboard > Payroll Master						
	<div style="float: right;"> <input type="text" value="Search"/> </div>					
Date From	<input type="text" value="Choose a date"/> 11/01/2018					
To	<input type="text" value="Choose a date"/> 11/29/2018					
	<input type="button" value="Search"/> <input type="button" value="Clear"/>					
Late Mark Deduction	Advance	P.F Amount	Gift Deduction	Absent Cutting	Deduction	Net Salary
0	5000	0.00	0	0.00	5000.00	0.00
0	-	0.00	0	0.00	0.00	0.00
0	-	0.00	875	0.00	875.00	0.00

Fig. Payroll Master Table5

- Salary column shows - (net salary - incentives)
 - Department column shows address.
 - Click on edit operation.

Payroll Master		Payroll Report				
Dashboard > Payroll Dashboard > Payroll Master						Search
Date From	Choose a date 11/01/2018	To	Choose a date 11/29/2018	Search	Clear	
tion	Absent Cutting	Deduction	Net Salary	Salary	Department	Operation
	0.00	5000.00	0.00	0.00	Sample Sample	
	0.00	0.00	0.00	0.00	PUNE BUND GARDEN	
	0.00	875.00	0.00	0.00	PUNE BUND GARDEN	

Fig. Payroll Master Edit Operation

- After click on edit operation, fill all the enable and mandatory fields.
 - Click on create button.
 - After click on create button, record will display in payroll report.

Employee Name	Employee Name Farhana Taj_1002		
Salary On Target	Salary On Target 0	Incentive	Incentive 0
Hold Salary (current-month)	Balance Salary * 0	Unauthorized AB	Unauthorized AB * 0
Salary By Cash	Salary By Cash * 0	Account Salary	Account Salary * 0
Status	Status * ▼	Date	Choose a date * ▼
Salary Mode	Salary Mode * ▼	Bank Name Salary Credit	Bank Name Salary Credit
Account No.	Account No.	IFSC Code	IFSC Code
Company Name	Company Name	Bank Name Salary Debited	Bank Name ▼
<input type="button" value="Create"/> <input type="button" value="Cancel"/>			

Fig. Payroll Master Update Form

b. Payroll Report

- Click on payroll report tab.
- Choose month and year.
- Click on the search button.
- User will able to search data according to month and year.
- By default month will show current month and year show current year.
- User is also able to export report in excel sheet format.

The screenshot shows a web-based payroll reporting system. At the top, there are two tabs: "Payroll Master" and "Payroll Report". The "Payroll Report" tab is active. Below the tabs, a breadcrumb navigation path reads "Dashboard > Payroll Dashboard > Payroll Report". A search bar labeled "Search" is positioned on the right. In the center, there is a search form with fields for "Month" (set to "November") and "Year" (set to "2018"). To the left of the search form is a blue button labeled "Export Report". Red arrows from the list above point to each of these three elements: the "Export Report" button, the "Month" dropdown, and the "Search" button.

Sr.No	Month	Date Of Joining	Employee Code	Employee Name	Department	Designation	Team Manager	Salary Type
4								

Fig. Payroll Report

- When user click on adjustment operation user will able to enter adjustment value in that textbox.
- After that adjustment value get added into actual salary in employee.

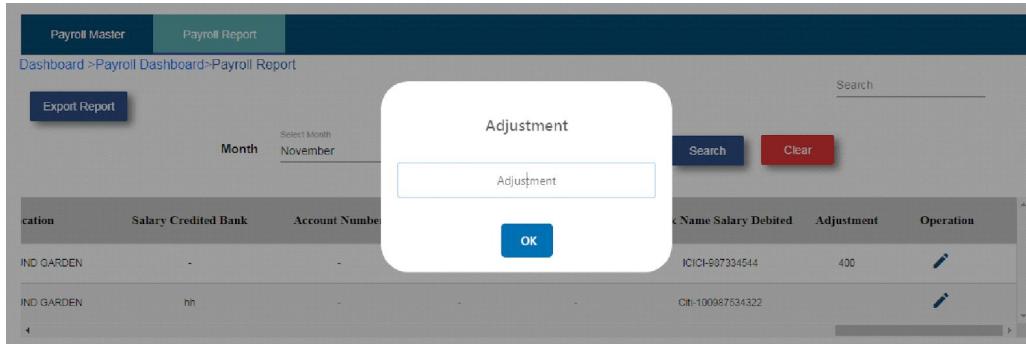


Fig. Adjustment Operation

