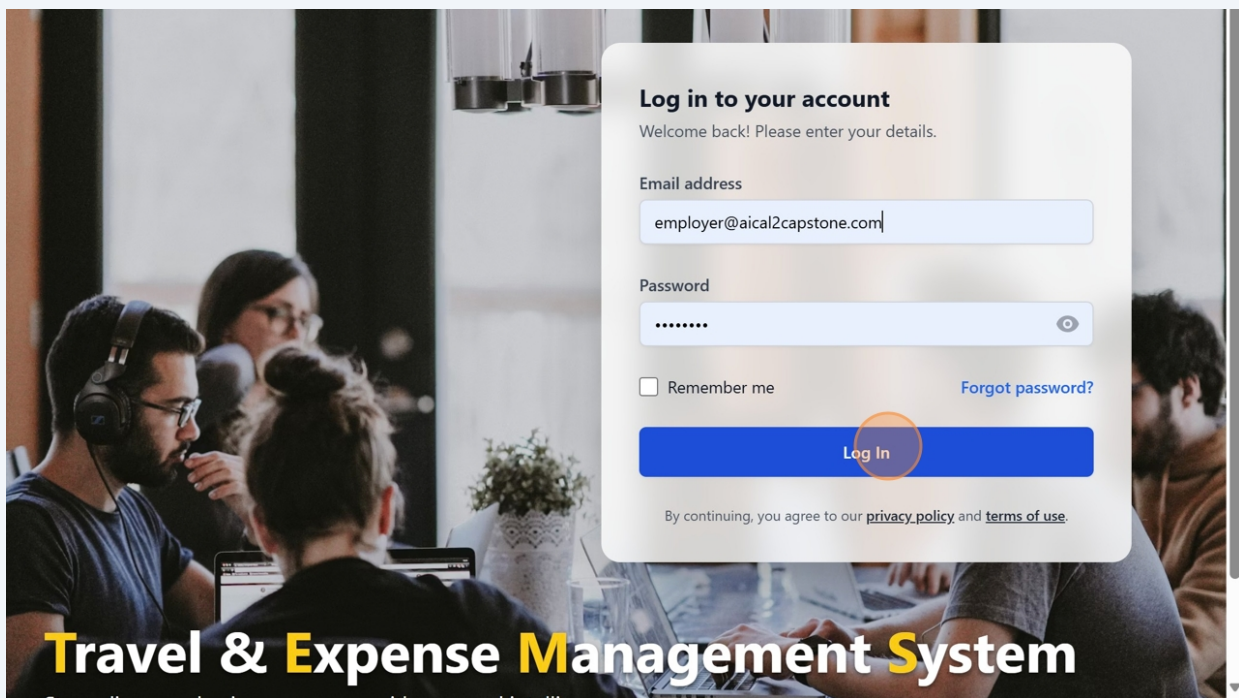


TEMS Employer Dashboard to Approve, Reject, and Manage Company, Clients, Projects, and Employees

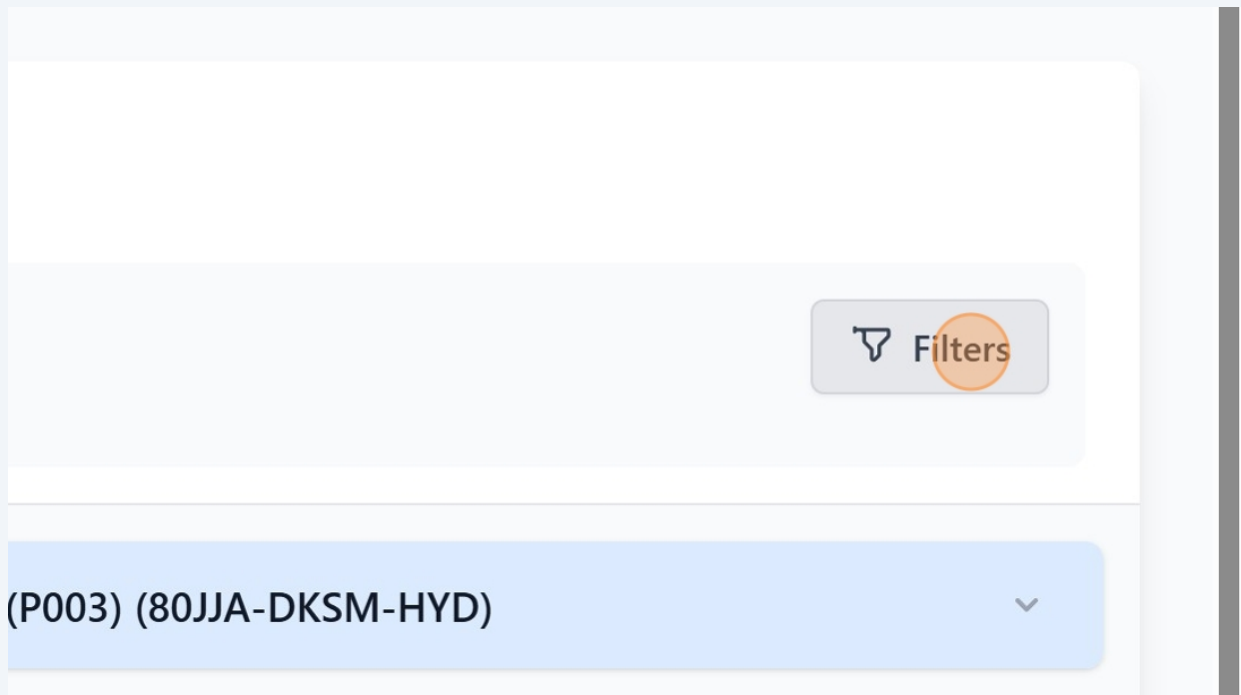
This guide provides a comprehensive walkthrough for employers using the TEMS Employer Dashboard, enabling efficient management of company operations, client interactions, project oversight, and employee administration. By following the outlined steps, users can easily approve or reject requests, manage client and project details, and oversee employee activities, ensuring streamlined processes and compliance with company policies. It's an essential resource for enhancing productivity and maintaining organized records within the platform.

1 Enter credentials and "Log In"

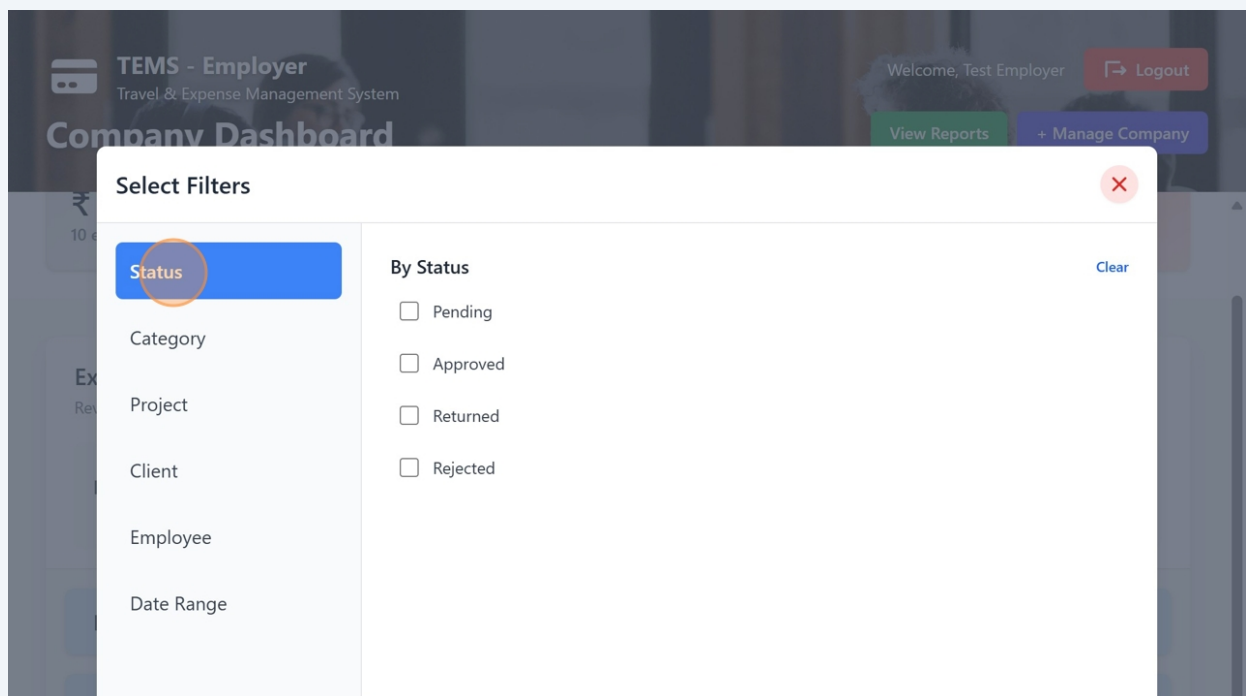


Filter on Dashboard

2 Click "Filters"



3 Various options of filters. Similar to employee dashboard



Expense History & Actions by Employers

4 Expenses are grouped by Project id and sub-grouped by employee.

Employer can take actions in 2 ways. Either by review of expense or directly.

Click on "eye" or view icon to view complete details of expenses including proof submitted.

DAKSM & Co LLP | 80JJAA Certificate Related Travel (P003) (80JJA-DKSM-HYD)

Deepak Bhholusaria

3 expenses

₹47,904.36

DATE	CATEGORY	AMOUNT	STATUS	DETAILS	ACTIONS
30/10/2025	Hotel	<div>\$500.00</div> <div>₹44,172.96</div>	pending	<div></div>	<div><div>✓</div><div>↶</div><div>✗</div><div>👁</div></div> <div>View F</div>
22/01/2025	Air/Bus/Train	₹2,975.40	pending	<div><div>📄</div><div>U</div></div>	<div><div>✓</div><div>↶</div><div>✗</div><div>👁</div></div>
09/11/2025	Air/Bus/Train	<div>\$756.00</div> <div>₹756.00</div>	pending	<div><div>📄</div><div>U</div></div>	<div><div>✓</div><div>↶</div><div>✗</div><div>👁</div></div>

AI Learning Guru | Consulting visit for Client ABC in Bangalore (CONS-BLR) (TC02-B)

5











Employer may either approve, return or reject. Optionally employer may also add comments before taking any action.

To	FIROZPUR CANT (FZR)
PNR	8327767431
Class	SECOND AC (2A)
Employee Remarks	Train ticket from New Delhi to Firozpur Cant for DEEPAKBHOLUSARIA, GITIKABHOLUSARIA, MILINDBHOLUSARIA.
Receipt	View Receipt
Approver Comment	
<div>Amount of ticket does not match with proof. Pls correct and resubmit</div>	
<div><div>Approve</div><div>Return</div><div>Reject</div></div>	

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6

For direct reject, click this icon

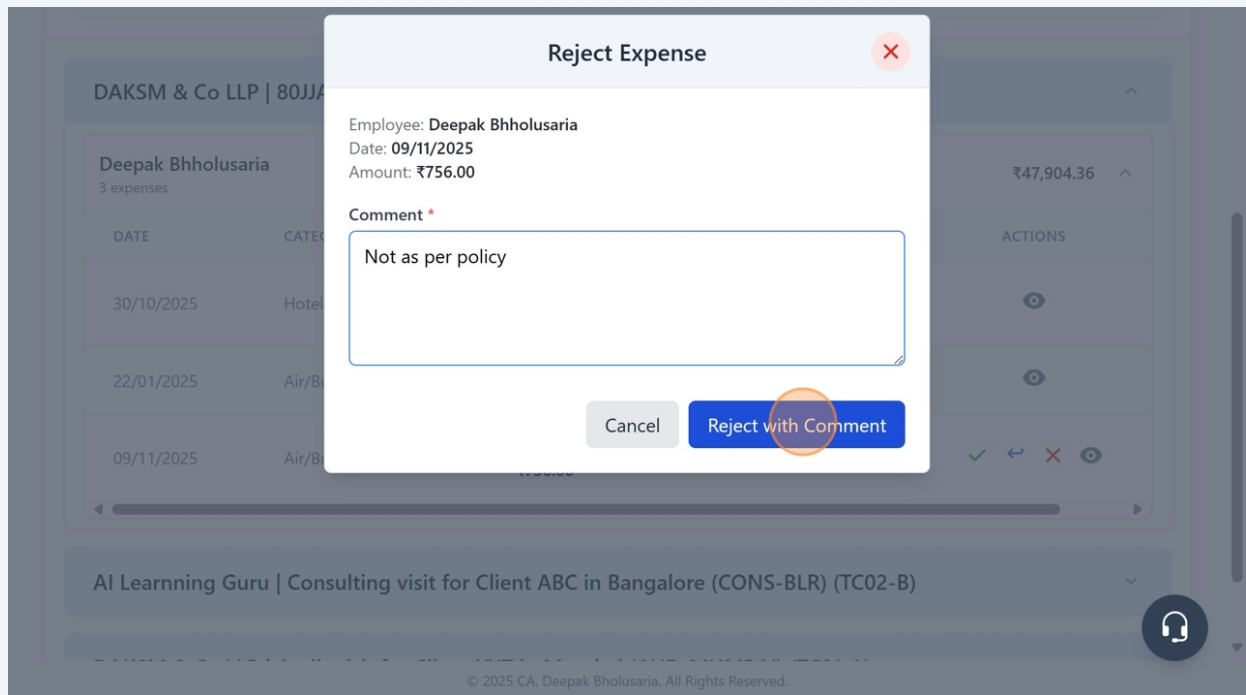
approved			
returned			
pending			<div><div>✓</div><div>↩</div><div></div><div></div></div>

Reject

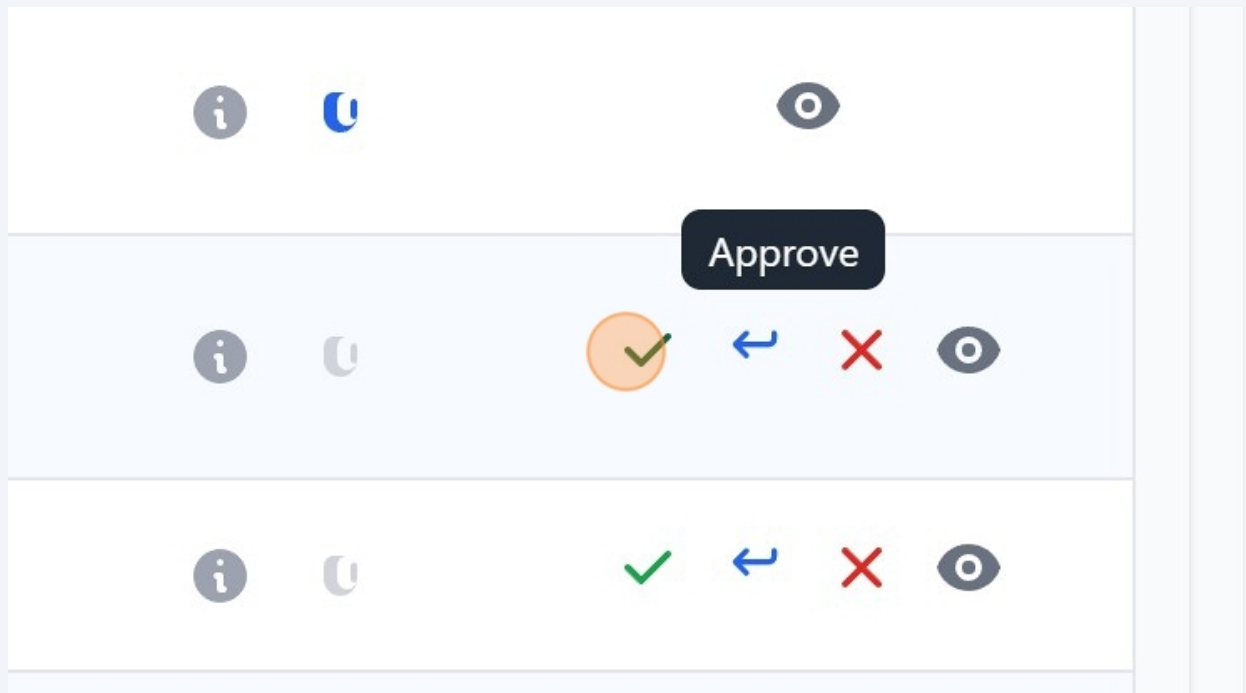
Bangalore (CONS-BLR) (TC02-B)



7 Add comments & reject



8 For direct approval, click this icon



9 Add comments and Click "Confirm Approval"

The screenshot shows a modal dialog titled "Approve Expense" with a close button (X) in the top right corner. The dialog contains the following information:

- Employee: Deepak Bhholusaria
- Date: 27/10/2025
- Amount: ₹11,700.12
- Comment (Optional): A text input field containing "Direct approval example".
- Buttons: "Cancel" and "Confirm Approval" (highlighted with an orange circle).

The background shows a table with columns: DATE, CATEGORY, AMOUNT, STATUS, DETAILS, and ACTIONS. The table has several rows of data, including dates from 08/07/2025 to 25/10/2025 and categories like Local, Hotel, Air/Bu, Other, and Food. The total amount is ₹4,390.99, and the status is "approved".

At the bottom of the screen, there is a footer with the text: "DAKSM & Co LLP | Audit visit for Client XYZ in Mumbai (AUD-MUMBAI) (TC01-A)" and a copyright notice: "© 2025 CA. Deepak Bhholusaria. All Rights Reserved."

Manage Clients, Projects & Employees

10 Click "+ Manage Company"

The screenshot shows a user interface for managing companies. The top section features a welcome message "Welcome, Test Employer" and a "Logout" button. Below this are two buttons: "View Reports" (green) and "+ Manage Company" (purple, highlighted with an orange circle). The bottom section displays two summary cards:

- Returned** (blue card with a left arrow icon): ₹61,350
- Rejected** (red card with a right arrow icon and a red X icon): ₹1,380

11 Click "Clients"

Company Dashboard

Manage Company

Clients Projects Employees

Add New Client

Client ID

Client Name

Existing Clients

ID	NAME
CL001	DAKSM & Co LLP
CL002	AI Learning Guru

12 Click "Edit" to edit existing client

Company Dashboard

Manage Company

Clients Projects Employees

Add New Client

Client ID

Client Name

Add Client

Existing Clients

ID	NAME	ACTIONS
CL001	DAKSM & Co LLP	Edit
CL002	AI Learning Guru	Edit

DAKSM & Co LLP | 80JJAA Certificate Related Travel (P003) (80JJA-DKSM-HYD)

Deepak Bhholusaria
3 expenses ₹47,904.36

13 Make edits and Click "Save"

The screenshot shows the 'Manage Company' dialog box with the 'Clients' tab selected. On the left, the 'Add New Client' section has input fields for 'Client ID' (containing 'e.g., CL001') and 'Client Name' (containing 'e.g., Acme Corp'), and an 'Add Client' button. On the right, the 'Existing Clients' table lists two clients. The first client, 'CL001' with name 'DAKSM & Co LLP', is highlighted, and its 'ACTIONS' column contains 'Save' and 'Cancel' buttons, with the 'Save' button circled in orange. The second client is 'CL002' with name 'AI Learning Guru' and an 'Edit' button. Below the dialog, a blurred background shows a client entry for 'DAKSM & Co LLP' and a user profile for 'Deepak Bhholusaria'.

ID	NAME	ACTIONS
CL001	DAKSM & Co LLP	Save Cancel
CL002	AI Learning Guru	Edit

14 Type client id and name in respective field and click "Add client" to add new client

The screenshot shows the 'Manage Company' dialog box with the 'Clients' tab selected. In the 'Add New Client' section, the 'Client ID' field contains 'CL003' and the 'Client Name' field contains 'AICA Level 2 Batch 1'. The 'Add Client' button is circled in orange. The 'Existing Clients' table on the right now lists three clients: 'CL001' (DAKSM & Co LLP) with an 'Edit' button, 'CL002' (AI Learning Guru) with an 'Edit' button, and a new entry 'CL003' (AICA Level 2 Batch 1) with an 'Edit' button. The background shows the same client entry and user profile as the previous screenshot.

ID	NAME	ACTIONS
CL001	DAKSM & Co LLP	Edit
CL002	AI Learning Guru	Edit
CL003	AICA Level 2 Batch 1	Edit



Similarly, you may edit or add new projects and employees

15 New Project

Clients

Projects

Employees

Add New Project

Client

AICA Level 2 Batch 1

Project ID

AICAL2

Travel Code

B1-Hyd

Description

AICA Level 2 Batch 1 Hyderabad

Add Project

Existing Projects

PROJECT ID	CLIENT	DESCRIPTION
P001	DAKSM & Co LLP	Audit visit for Client XYZ in Mumbai
P002	AI Learning Guru	Consulting visit for Client ABC in Bangalore
P003	DAKSM & Co LLP	80JJAA Certificate Related Travel

- 16 Click "Reset Pass" to reset passwords for employees on employee tab

MOBILE	ROLE	ACTIONS
m	employee	Edit Set Pass Reset Pass
		Edit

- 17 Message - "Password reset email sent successfully to deepak@bholusaria.com."

Manage Company

Password reset email sent successfully to deepak@bholusaria.com.

NAME	EMAIL	MOBILE

18 Press **ctrl + left**

TEMS - Employer
Travel & Expense Management System

Welcome, Test Employer [Logout](#)

Manage Company

ClientsProjectsEmployees

Add New Employee

Full Name

Test Employee 2

Email

employer@aical2capstone.com

Mobile

e.g. +91...

Initial Password

.....

Role

Employee

Add Employee

Manage Employees

Password reset email sent successfully to deepak@bholusaria.com.

NAME	EMAIL	MOBILE	ROLE	ACTIONS
Deepak Bholusaria	deepak@bholusaria.com	+91 98765 43210	employee	Edit Set Pass Reset Pass
Test Employee	employee@aical2capstone.com	+91 98765 43210	employee	Edit Set Pass Reset Pass
Test Employer	employer@aical2capstone.com	+91 98765 43210	employer	Edit Set Pass

DATECATEGORYAMOUNTSTATUSDETAILSACTIONS

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19 Click "Add Employee"

Test Employee 2

Email

employer2@aical2capstone.com

Mobile

9999999999

Initial Password

.....

Role

Employee

Add Employee

NAME	EMAIL	MOBILE
Deepak Bholusaria	deepak@bholusaria.com	5
Test Employee	employee@aical2capstone.com	5
Test Employer	employer@aical2capstone.com	5

View report options

20 Click "View Reports"

Welcome, Test Employer

Logout

View Reports

+ Manage Company

ed
264
ses

Returned
₹61,350
4 expenses

Rejected
₹1,380
3 expenses

21 Click "Total expenses by employee, grouped by status."

Company Reports

Select a Report

- Employee Summary**
Total expenses by employee, grouped by status.
- Project Breakdown**
Itemized list of all expenses for a single project.
- Category Analysis**
Company-wide spending totals by expense category.

Filters

Date Range (Optional)

dd-mm-yyyy to dd-mm-yyyy

Generate Report

22 Click "Itemized list of all expenses for a single project."

Company Reports

Select a Report

- Employee Summary**
Total expenses by employee, grouped by status.
- Project Breakdown**
Itemized list of all expenses for a single project.
- Category Analysis**
Company-wide spending totals by expense category.

Filters

Project

DAKSM & Co LLP - 80JJAA Certificate Related Travel

Date Range (Optional)

dd-mm-yyyy to dd-mm-yyyy

Generate Report

23

Click "Company-wide spending totals by expense category."



Employee Summary

Total expenses by employee, grouped by status.



Project Breakdown

Itemized list of all expenses for a single project.



Category Analysis

Company-wide spending totals by expense category.

Date Range (Optional)

dd-mm-yyyy



to

dd-mm-yyyy



Generate Report