**Client Configuration Module** Used by: Admin/HR

Purpose: Setup client-specific rules

|  |  |  |
| --- | --- | --- |
| **Field** | **Type** | **Description** |
| Client Name | Text | Unique name |
| Address |  |  |
| Billing Address |  |  |
| GST Number |  |  |
| Pan Details |  |  |
| Leave Policy | Upload | PDF/doc |
| NDA Template | Upload | PDF/doc |
| Timesheet Type | Dropdown (Weekly/Monthly) | Frequency of timesheet |
| Timesheet Cutoff Day | Date Picker | Last date to submit |
| Salary Calculation Rule | Dropdown | e.g., per day, per hour, fixed |
| Billing Rule | Dropdown | Hourly / Monthly / Per Task |
| Invoice Payment Terms | Dropdown/Integer | E.g., 30, 45, 60 days |
| Default PO Template | Upload (Optional) | Optional format for clients |
| Leave Policy | As per client policy |  |

✅ Actions:

* Create/Edit Clients
* Manage policies per client
* Set rules for downstream processes

**Client SPOC Module**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Type | Mandatory? | Description |
| Client ID | Dropdown (FK) | ✅ Yes | Link to the Client (from Client Master) |
| SPOC Name | Text | ✅ Yes | Full name of the SPOC |
| Email | Email | ✅ Yes | Official email ID of the SPOC |
| Mobile | Text (Number) | ❌ Optional | Contact number |
| Location | Text | ❌ Optional | SPOC's base location or client branch |
| Designation | Text | ❌ Optional | Designation of the SPOC (e.g., Manager, VP, etc.) |
| Functional Roles | Multi-select Dropdown (Text []) | ✅ Yes | Roles associated: Accounts, Technical, Legal, etc. |
| Accounts Handled | Multi-select Dropdown | ❌ Optional | List of accounts/projects/units this SPOC manages under the client |
| Status | Dropdown | ✅ Yes | Active / Inactive |
| Created At | Date Time (Auto) | ✅ Yes | Auto-filled timestamp when SPOC is added |
| Last Updated | Date Time (Auto) | ❌ Optional | Timestamp of the last update made to this SPOC record |

**Resource Registration Form**

**Purpose:** Capture resource onboarding data, assign to client with PO, upload necessary documents.

**Basic Details** Used by: HR/Admin

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Type** | **Required** | **Notes** |
| Full Name [As per Pan card] | Text | ✅ |  |
| Email ID | Email | ✅ | Used for login |
| Mobile Number | Number | Optional | For alerts |
| Mobile Number - WhatsApp | Number | ✅ |  |
| Date of Joining (DOJ) | Date Picker | ✅ | Joining with your company |
| Designation | Text | ✅ |  |

**Client Assignment [This will not share to resource]**

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Type** | **Required** | **Notes** |
| Client Name | Dropdown | ✅ | Pre-configured from client module |
| Date of Joining (DOJ) with Client | Date Picker | ✅ | Joining with Client company |
| Place of Supply [Location] | Dropdown | ✅ | Select Cities |
| PO Number | Text | ✅ | As per client-issued PO |
| PO Start Date | Date Picker | ✅ | Start of assignment |
| PO End Date | Date Picker | ✅ | Assignment expiry |
| PO Value (₹) | Number | ✅ | Contract billing cap |
| GST |  | ✅ |  |
| TDS |  | ✅ |  |
| PO Document Upload | File Upload | ✅ | PDF/Image format |

**Salary Information**

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Type** | **Required** | **Notes** |
| Offered Salary (CTC) | Number (₹) | ✅ | Monthly/Annual as per policy |
| Salary Breakup | Auto-generated table client wise | ✅ | Basic, HRA, Special Allowance, PF, etc. |
| Currency | Dropdown | ✅ | For global clients [Rupee/Dollar] |

**Documents Upload**

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Type** | **Required** | **Notes** |
| Offer Letter | Upload | ✅ | PDF |
| NDA Document | Upload | ✅ | Auto-loaded from client config or custom |
| Leave Policy | Upload | ✅ | Auto-loaded from client config |
| Bank Details Form | Upload | ✅ | Need to upload |
| ID Proof / PAN / Aadhar | Upload | ✅ | KYC purposes |

**Actions**

|  |  |
| --- | --- |
| **Button** | **Action** |
| ✅ Save & Send to Resource | Sends verification mail with login link |
| ✏️ Edit Later | Saves draft form |
| ❌ Cancel | Exits the form |

**Onboarding Metadata – [This will not share to resource]**

|  |  |  |
| --- | --- | --- |
| **Field Name** | **Field Type** | **Description** |
| **Onboarding Source Type** | Dropdown (Required) | Values: Internal, External Source, Client Reference |
| **Onboarded By** | Conditional Dropdown / Text | Depends on source type: shows dynamic options/input |

**🔽 Field Behaviour Based on Selection**

1. **If Internal is selected**  
   Show this dropdown:
   * Recruiter
   * Lead
   * Account Manager  
     *(Optionally, add employee name from a list or autocomplete)*
2. **If External Source is selected**  
   Show this dropdown:
   * Freelancer
   * Vendor
   * Others  
     *(Optional text box for name/company details)*
3. **If Client Reference is selected**  
   Show this dropdown:

*(Select from added Spoc list from client)*

**Logic/Validation:**

* Cannot save if PO document or dates are missing.
* Offered Salary should not exceed PO Value
* PO End Date should be later than DOJ.
* Client selection loads NDA/Leave automatically (from client setup)

--------------------------------------------------------------------------------------------------------------

**Resource Portal** I Used by: Resource  
**Purpose:** Profile verification, doc acceptance

|  |  |
| --- | --- |
| **Page** | **Feature** |
| Profile Review | Shows: DOJ, Salary, Client, PO Duration |
| Documents Tab | Offer Letter, NDA, Leave Policy |
| Accept/Reject NDA | Accept button + digital signature or upload signed |
| Feedback Option | Comment box → send back to HR for corrections |

✅ **Actions:**

* Resource can't access timesheet until NDA is accepted

**Timesheet Management Module**

**Used by:** Resource, Internal Team, Client (optional)

|  |  |  |
| --- | --- | --- |
| **Field** | **Type** | **Description** |
| Timesheet Period | Auto/Dropdown | Based on client rule |
| Date | Date Picker | Each day or range |
| Task Description [It is not applicable for client resources] | Text | What was done |
| Hours Worked | Number | Input hours |
| Attachments | Upload | Screenshot, doc, ticket, etc. |
| Status | Auto | Draft → Submitted → Reviewed → Send Back/Approved/Rejected |
| Comments | Textarea | Used by team/client to give feedback |

✅ **Actions:**

* Can’t submit beyond PO end date
* HR/Client can partially approve

**Salary Calculation Engine**

**Used by:** System (Automated)  
**Trigger:** Once timesheet is approved

|  |  |
| --- | --- |
| **Inputs** | **Source** |
| Approved Hours/Days | Timesheet |
| Salary Structure | Resource Profile |
| Leave/LOP | Client leave rules |

✅ **Outputs:**

* Calculated Salary (adjusted for LOPs)
* Auto Salary Slip (PDF)
* Push to payroll or export to Excel

**Invoice Management Module Used by:** Finance

|  |  |  |
| --- | --- | --- |
| **Field** | **Type** | **Description** |
| Client | Auto | From timesheet |
| Resource | Auto | From timesheet |
| Period | Auto | Month/week |
| Invoice Amount | Auto | Based on billing rules |
| PO Validation | Auto | Check PO balance & dates |
| Invoice No. | Auto/Manual |  |
| Attachments | Upload / Download | Invoice PDF |
| GST | Auto |  |
| TDS | Auto |  |
| Status | Dropdown | Draft / Sent / Approved / Paid |
| Sent On | Date |  |
| Due Date | Auto | Based on payment terms |
| Payment Received On | Date |  |
| Proof of Payment | Upload | Bank receipt, UTR |

✅ **Actions:**

* Raise invoice
* Download invoice
* Track payment lifecycle

**Payment Tracking**

**Features:**

* Record payment status:
  + Paid / Partially Paid / Overdue
* Attach bank proof or UTR, payment screenshot
* Tag to invoice and resource

**LEAVE POLICY MANAGEMENT (System-Driven Per Client)**

**📌 Leave Types & Annual Entitlements (Standard)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Leave Type** | **Days/Year** | **Carry Forward?** | **Accrual Method** |
| Casual Leave (CL) | 12 | Yes (up to 6 days) | Monthly (1 per month) |
| Sick Leave (SL) | 10 | Yes (full allowed) | Monthly (0.83 per month) |
| Earned Leave (EL) | 15 | Yes (full allowed) | Monthly (1.25 per month) |
| Client-Specific | As per terms | As defined | As defined |
| LOP | NA | NA | Based on absence |
| Public Holidays | As per calendar | NA | Based on client config |

**🧮 Accrual + Balance Tracking Logic**

* **Leave accrued** each month based on joining date or reset on financial year start (customizable).
* **Previous Leave Balance** can be imported when onboarding an existing employee from another system or extending their contract.
* **Leave ledger** maintained: Earned, Availed, Balance (month-wise).

**🔄 System behaviour for Existing Employees**

|  |  |
| --- | --- |
| **Scenario** | **System Handling** |
| Employee joined before system launch | HR can manually **import opening balances** for each leave type |
| Monthly accrual is enabled | System will **add new accruals** every 1st of month or on DOJ anniversary |
| Leaves availed are approved | **Balance is auto-adjusted** after approval workflow |
| Employee rejoins / continues | Previous balance continues; auto-accrual resumes |
| Unused carry-forward limit exceeded | Carry forward as per policy (e.g., max 6 CLs); extra lapses |

**📥 Fields to Add in Database (leave balances table)**

|  |  |  |
| --- | --- | --- |
| **Field Name** | **Type** | **Notes** |
| employee\_id | FK (INT) | Link to resource |
| leave\_type | ENUM | CL / SL / EL / Client-Specific |
| year | INT | Financial year or calendar year |
| opening\_balance | DECIMAL(5,2) | Balance carried over from last year |
| accrued | DECIMAL(5,2) | Auto-generated based on rules |
| availed | DECIMAL(5,2) | Approved leaves in the current year |
| current\_balance | DECIMAL(5,2) | opening + accrued - availed |
| last\_updated | DATETIME | Auto update when changes occur |

**✅ Leave Approval Rules (As per your document)**

* Leave request must be submitted **at least 3 days in advance** *(except emergencies)*
* **Sick leave > 2 days** → needs **medical certificate**
* Leave requires **client manager + HR approval**
* **Uninformed leave** → marked as **LOP** automatically or via team review

**🎛️ HR Actions Allowed**

* Import / update **previous leave balance**
* Adjust **carry-forward limits** (client-wise or company-wide)
* Define **leave approval matrix** (Resource → Client Manager → HR)
* View **leave history, audit trail, and balance status**

**📝 Leave Policy Document (Sample)**

**Company Name:** [Your Company Name]  
**Policy Effective From:** [DD-MM-YYYY]  
**Applies To:** All employees unless overridden by client-specific terms.

**📌 1. Types of Leaves**

|  |  |  |
| --- | --- | --- |
| **Leave Type** | **Description** | **Entitlement** |
| **Casual Leave (CL)** | For personal matters, short trips, etc. | 12 days per year |
| **Sick Leave (SL)** | For medical or health reasons | 10 days per year |
| **Earned Leave (EL)** | For long vacations, travel, etc. | 15 days per year (accrued) |
| **Client-Specific Leave** | As per client calendar / agreement | As per contract |
| **Loss of Pay (LOP)** | Unapproved or excess leave | As applicable |
| **Public Holidays** | As per your assigned client’s location/calendar | Depends on client calendar |

**🧾 2. Leave Application Rules**

* All leaves must be applied through the **employee portal** at least 3 days in advance (except sick leave).
* Attach **supporting documents** (e.g., medical certificate for sick leave > 2 days).
* Leave applications will be **routed to client managers (if applicable)** and **HR** for approval.

**⛔ 3. Leave Rejection / Non-Compliance**

* Absence without approval may lead to **Loss of Pay (LOP)**.
* **3 consecutive days** of unnotified absence will lead to disciplinary action.
* Repeated misuse of leave may affect salary disbursal or employment status.

**💸 4. Impact on Salary & Billing**

* Leave will be considered while processing **salary** and **client billing**.
* In client-bound projects, only **client-approved timesheets** are eligible for salary.
* If partial leaves are approved, remaining hours may fall under **LOP**.

**✍️ 5. Acknowledgement**

Each employee must acknowledge this policy through the portal before starting timesheet submissions.