A

# User Manual

## Guide

for

# ERPICA

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Note: Activity Tracker: Attendance, Leave, Asset, Expenses, Task Manager

# 1. What is ERPICA?

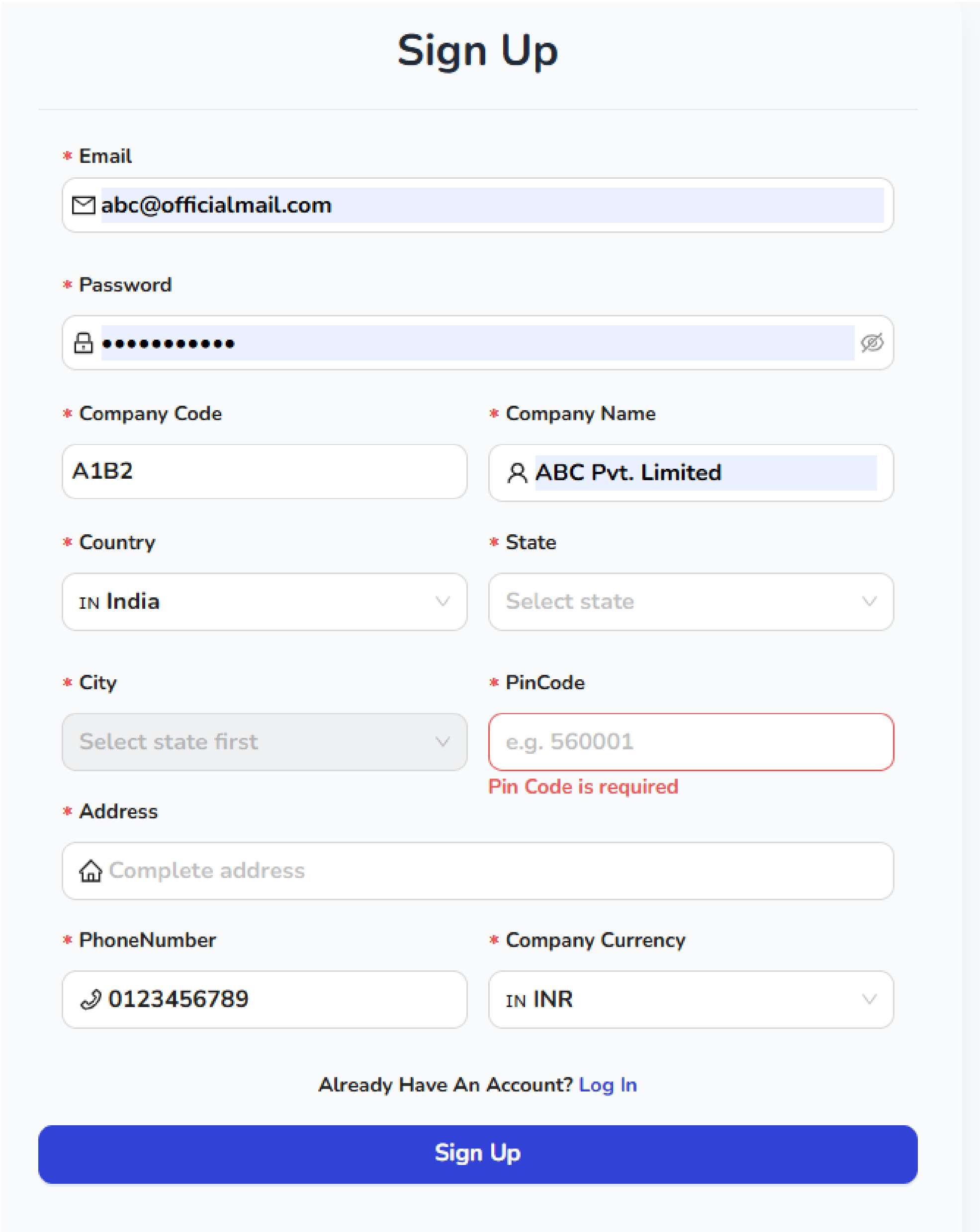
ERPICA enables organizations to manage their HR and project operations through a unified platform. It supports the complete employee lifecycle from onboarding to retirement or resignation and includes robust features for asset management, payroll, attendance and other essential administrative processes.

# 2. What is HRMS?

A Human Resource Management System is a software solution that helps organizations manage and automate their HR processes. It brings all HR functions into one digital platform so companies can handle employee information, workflows and administrative tasks more efficiently.

➢ **Key features of HRMS:**
- Employee records
- Onboarding and offboarding
- Attendance and leave tracking
- Payroll processing
- Performance management
- Asset tracking
- Expenses Tracking
- Recruitment support
- Reports and analytics

## 3. How to create an account for a company?

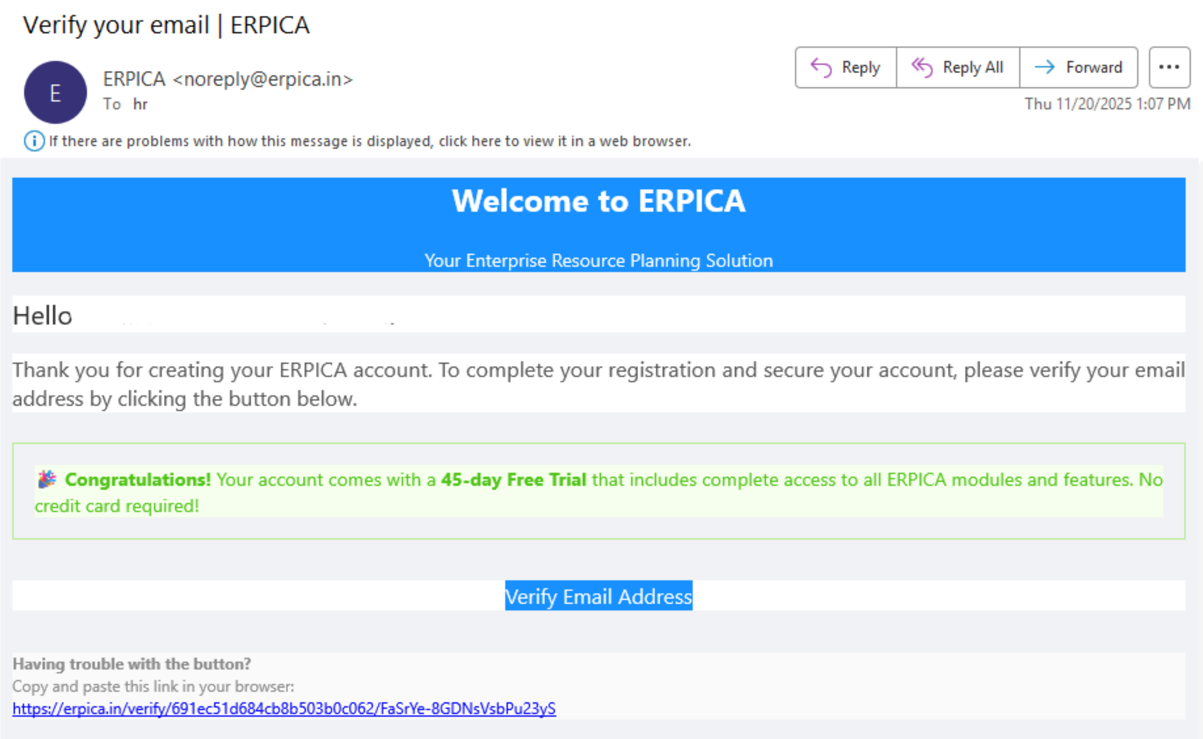



### Registration Steps

1. Open the Sign Up page: Create New Account
2. Fill in all required details as shown in the screenshot (company email, password, company info, address, contact, and currency).
3. Review the information and click Sign Up to complete registration.

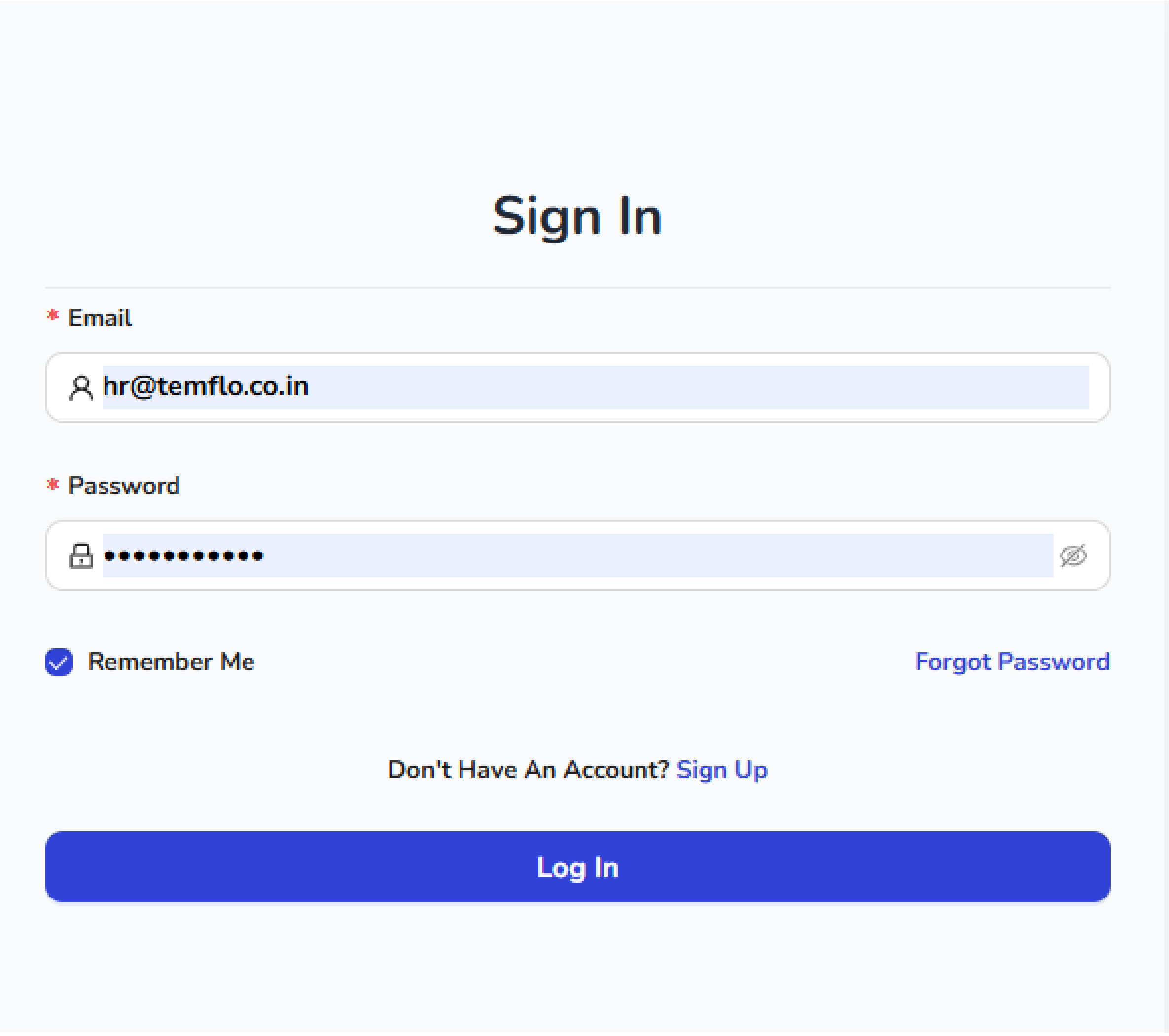
### Email Verification & Account Activation

Once you sign up, a verification link will be sent to your email. Open it, verify your account and then proceed to complete your company details.




### Sign In to Your Account

After your account is verified, return to the portal and sign in using your registered email address and password to access and manage your company details.




**Roles in ERPICA**

**Owner**

The Owner is the person who creates the company account in ERPICA for the first time. Only the Owner can purchase a subscription and has full control over the system. The Owner can assign Admins to manage employees, assets,Business Locations, and other company operations.

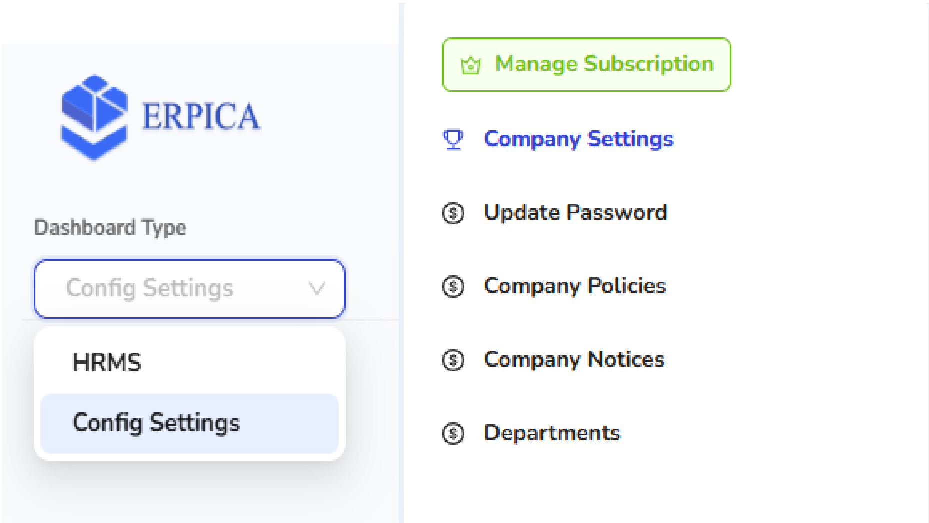
**Admin**

An **Admin** is appointed by the Owner. Admins have **full operational control similar to the Owner**, including managing employees,business locations, assets, and departments. However, **subscription purchase and management are exclusively handled by the Owner**.

**Employee**

An Employee is a member of the organization working in an official role. Employees can access ERPICA based on the permissions given to them. They can view their tasks, attendance, leave details, payroll information, and other features allowed by the Owner or Admin.

## Set Up Your Account

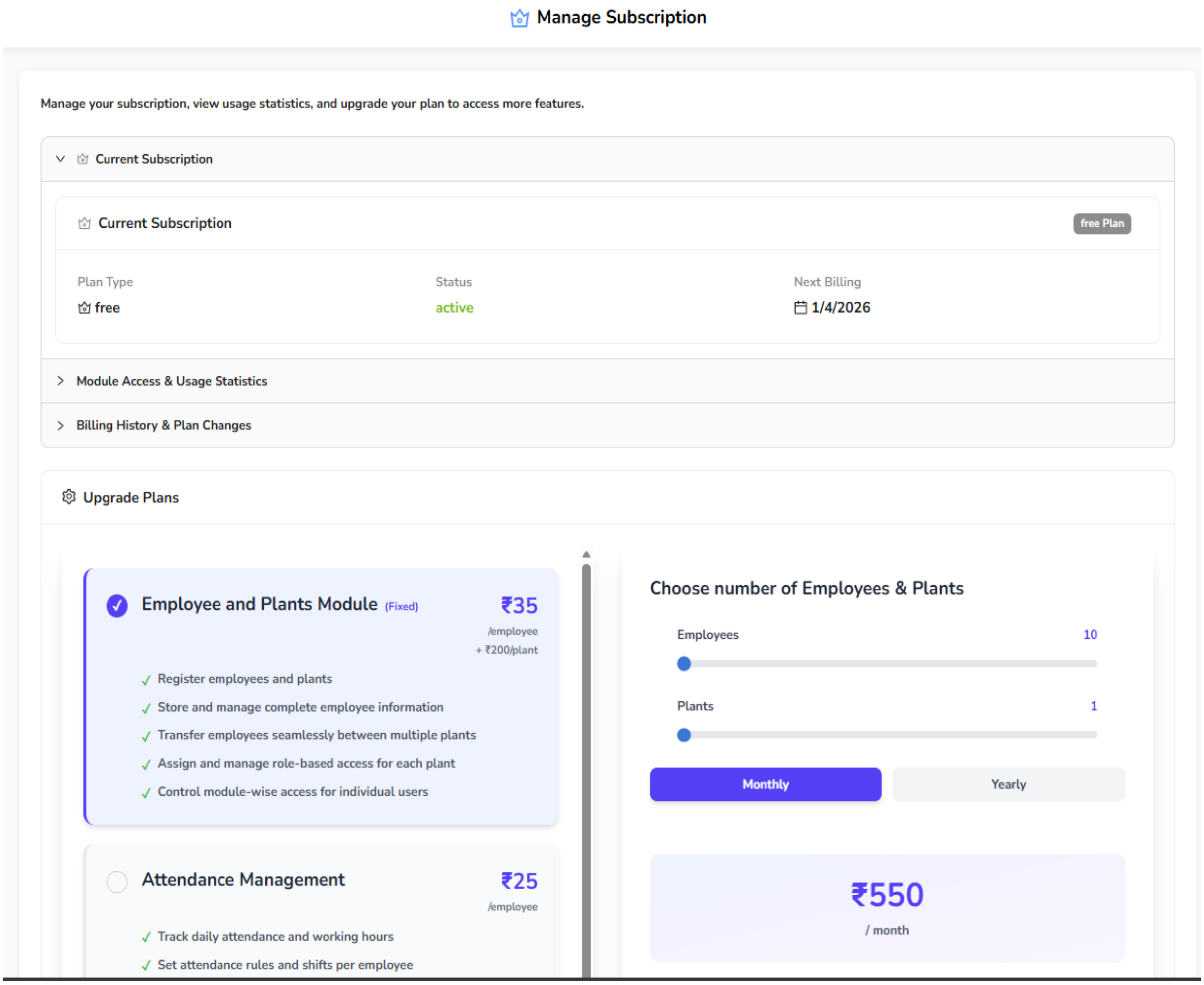



ERPICA offers dedicated dashboards to simplify both employee and organizational management. The **HRMS Dashboard** helps manage employee-related activities like attendance, business location assignments, and daily work operations. The **Config Settings Dashboard** is used to set up and manage company structure, core details, business locations creation, and high-level system settings.

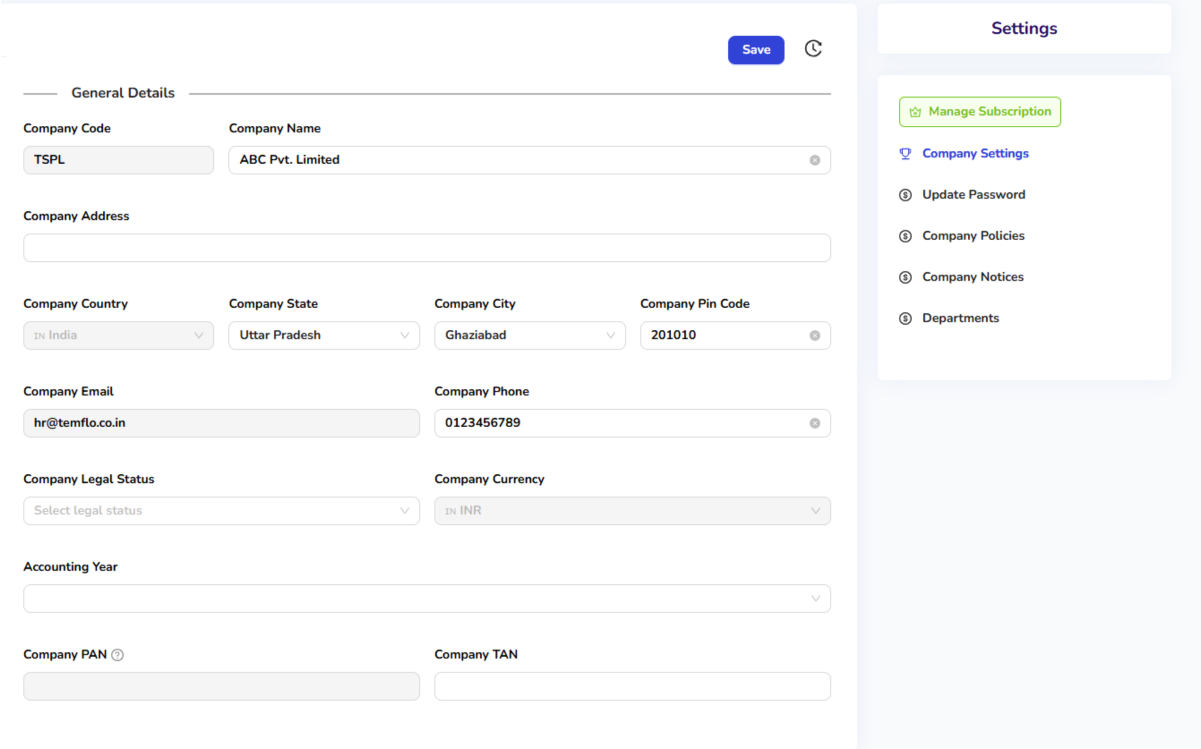
From the Config Settings page, you can manage all essential company setup as follow : -

**Manage Subscription**

**Manage Subscription** page where users can view their current subscription and plans, upgrade or downgrade plans, access billing details, and use a pricing calculator to estimate subscription costs.



## a. Company Setting

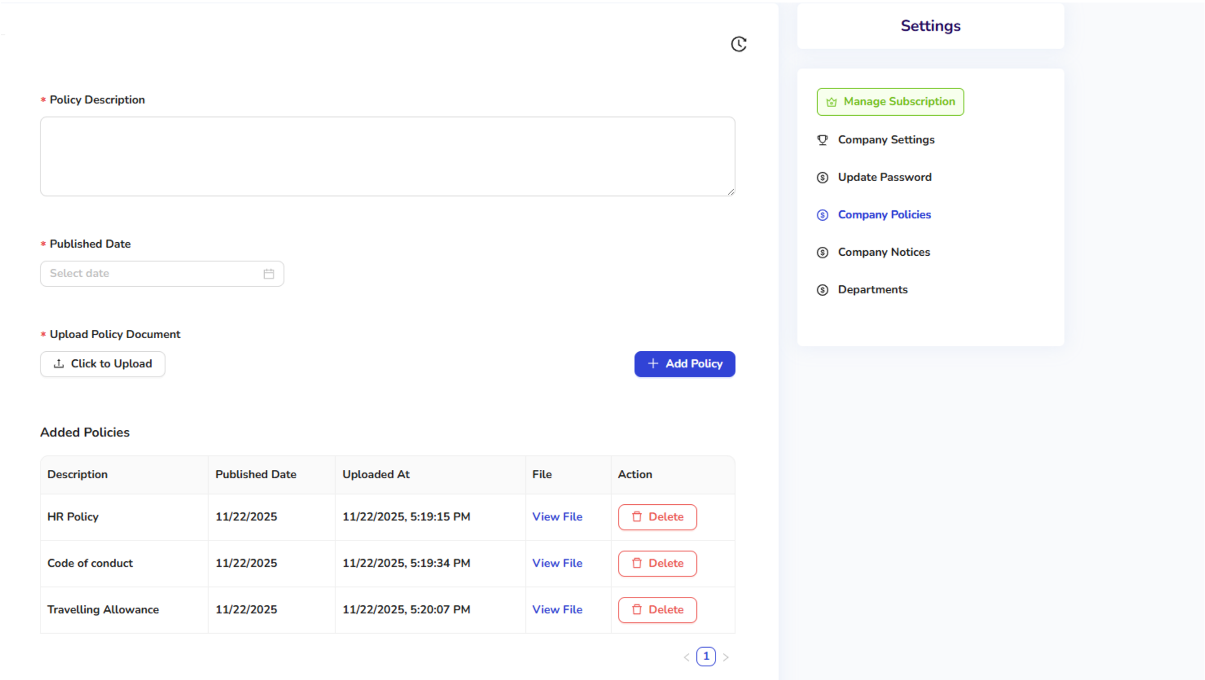



Fill in all details as shown in the screenshot for the future uses.

## b. Update Password


You can update your password by entering your current password and setting a new password from the company settings page.

## c. Company Policies




All company related policies such as HR guidelines, leave policies and other organizational rules can be published or unpublished from this section. Once published, these policies become visible to all employees, allowing them to stay updated with the latest company regulations. If any policy needs revision or temporary removal, the admin can simply unpublish it until the updated version is ready. This ensures that employees always have access to accurate and up to date information regarding company procedures and expectations.

Fill the details of policy along with the document as given in the ScreenShot above.

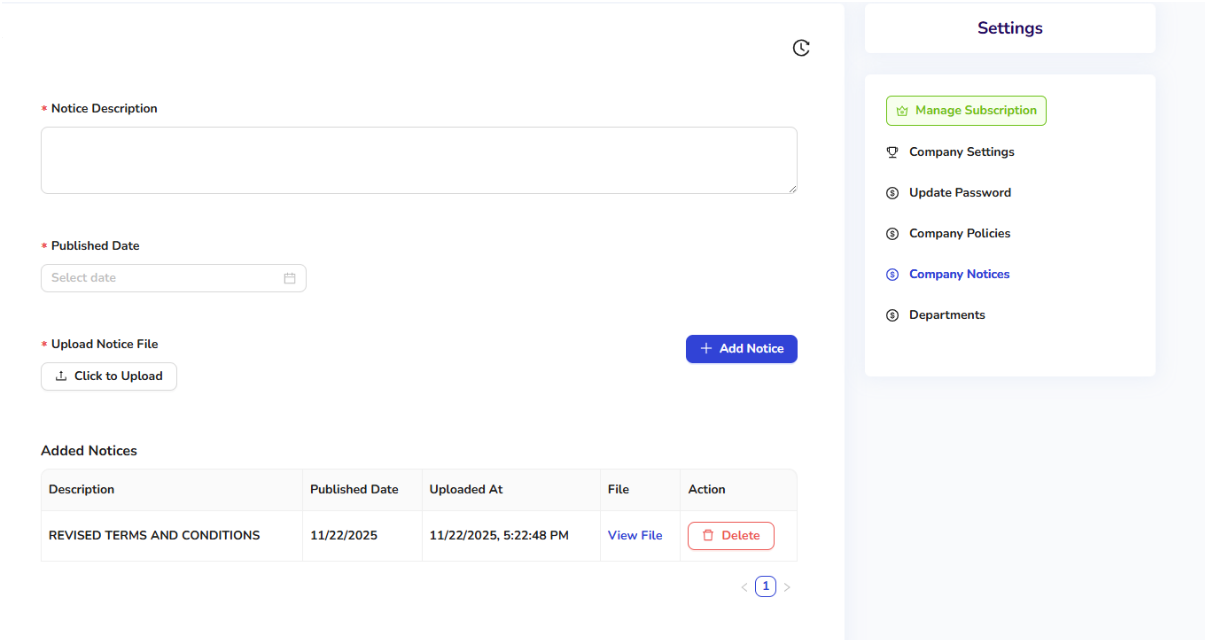
## d. Company Notices

Company notices are official messages shared by the organization to inform employees about important updates, announcements, or instructions.

Common examples of company notices

- Company holidays and office closures

- Policy updates or changes
- New joining announcements
- Internal transfers or promotions
- Maintenance or system downtime alerts
- Compliance or safety instructions
- Office events, trainings, or town halls

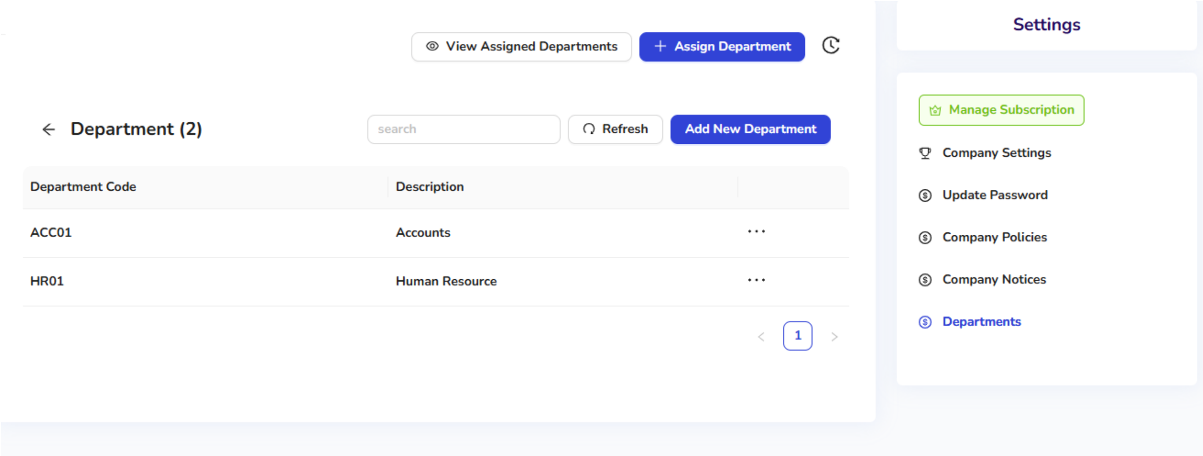



Company Notices are posted by the Owner or Admin and are visible to employees after login.

Fill the details of notice along with the document as given in the ScreenShot above.

## e. Departments

We can also add or remove different departments within a single organization. These may include Accounts, HR, Service, Operations, Engineers, and Sales, along with any other departments the company requires. This flexibility allows the organization to structure teams clearly and manage workflows more efficiently.




From this page, you can create departments, assign them to specific business locations, and view all departments mapped to each location.

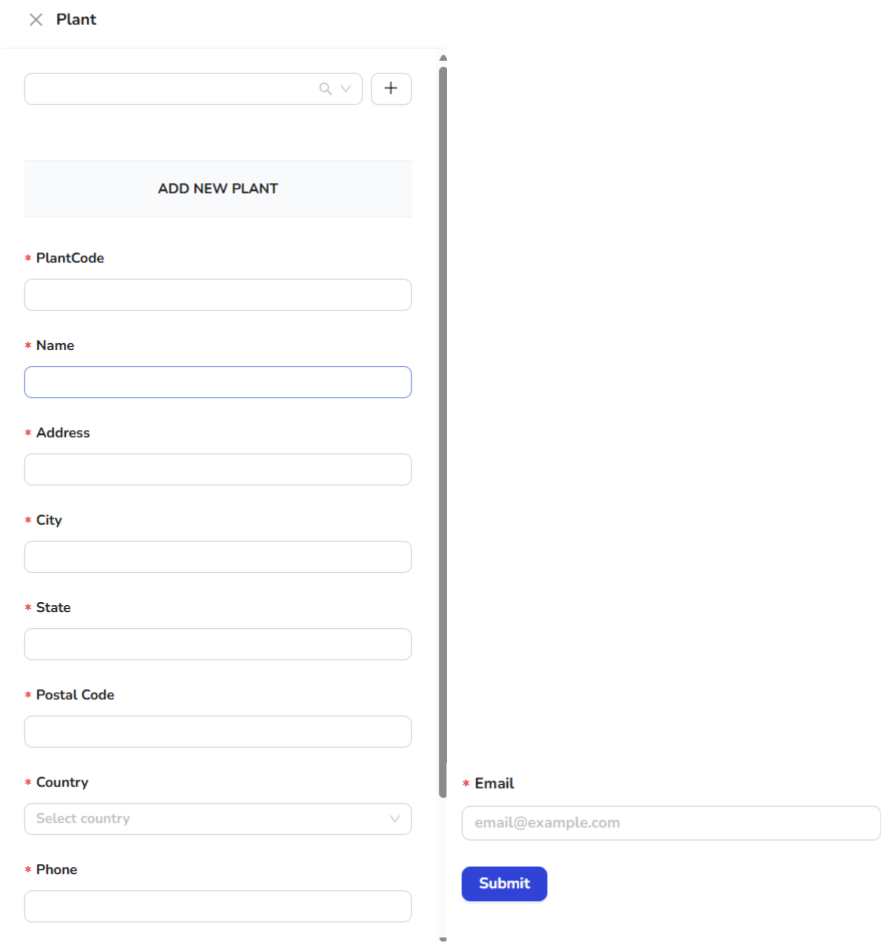
# 4. <u>Business Locations</u>

In ERPICA, a **Business Location** refers to a specific work location, unit, or assignment within a company. It can be a physical site, department, client project, or any designated place where employees are deployed. Business Locations help organizations track employee allocation, attendance, tasks, and performance based on where employees are assigned.

A Business Location can be a manufacturing unit, production site, warehouse, service center, office branch, or any single premises where business operations take place.

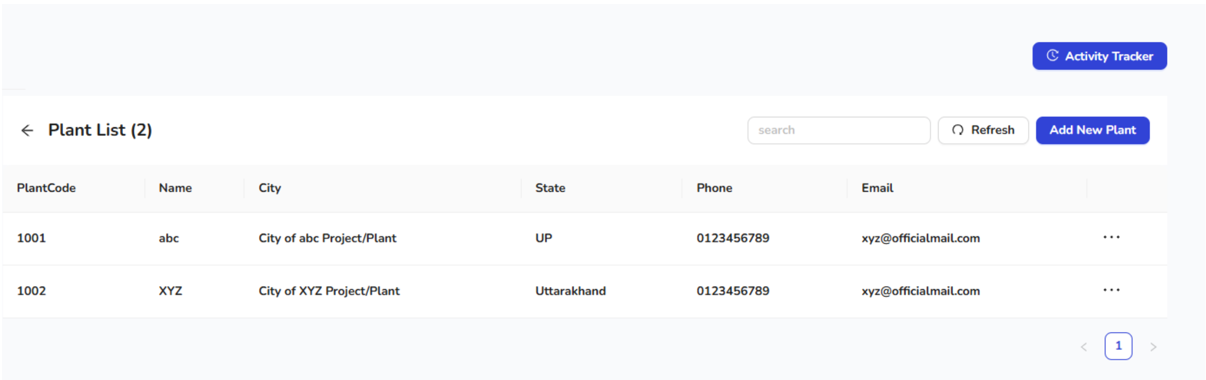
**How can an Owner create a Business Location?**

The **Owner** can create a Business Location by entering the required location details along with the Owner's email address in the form and submitting it. Once submitted, the registration process is completed and the Business Location is created.




## Check created Business Locations

## Once created, the Business Locations will appear in the dashboard for management and assignment.



# 5. Department

In a company, a department is a specific group or unit that handles a particular function or area of work. Each department has its own responsibilities, goals, and expertise, but all departments work together to run the company smoothly.

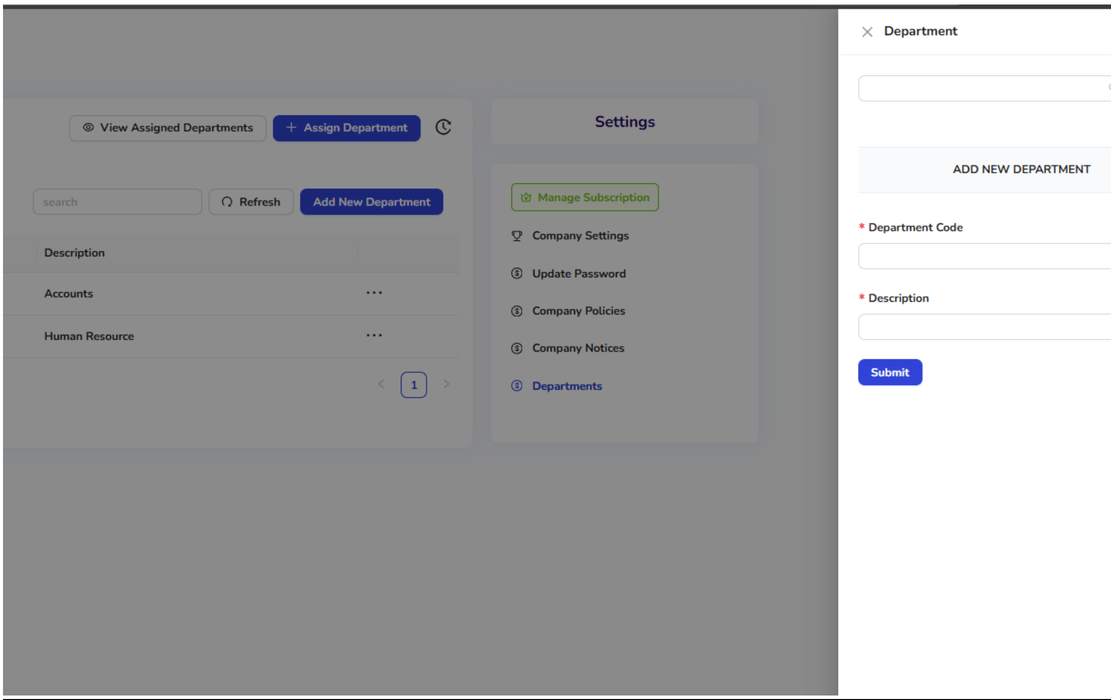
Examples of common departments:

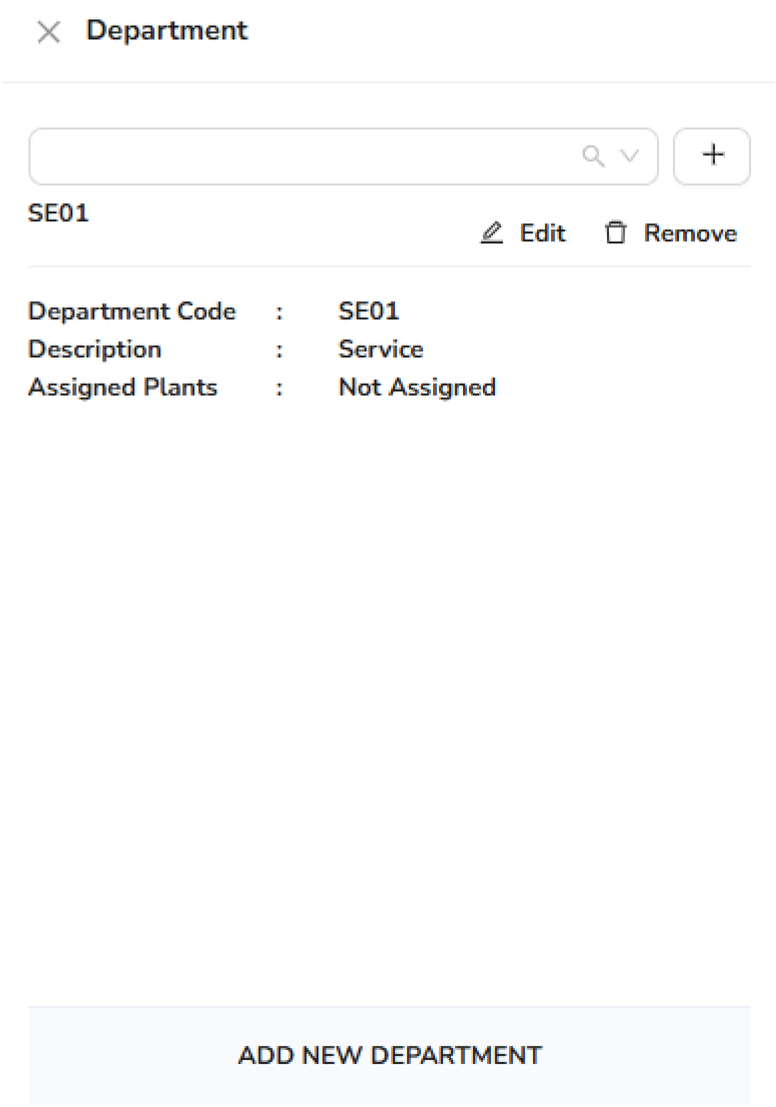
- Human Resources – hiring, payroll, employee policies, performance management
- Accounts – budgeting, payments, salaries, financial reporting
- Sales – selling products or services, client acquisition
- Business Development – branding, promotions, social media, campaigns
- Operations – day-to-day business activities
- IT / Tech – systems, software, data, and tech support
- Admin – office management, documentation, coordination
- Service- Engineers & Project Manager

## a. How to Add Departments?

1. Visit Department Tab in Config Setting Dashboard
2. Click on **Add New Department.**
3. Mention the department code and department name.
4. Then click **Submit**.

5. After submission, it will appear like this:



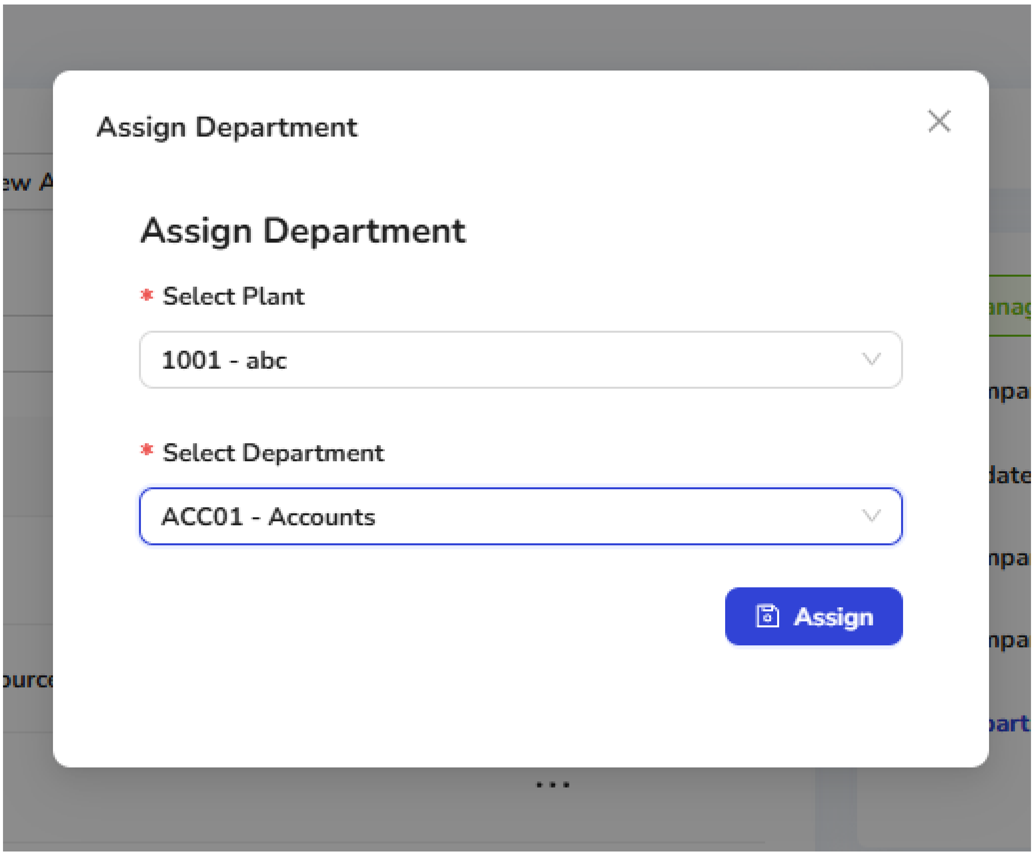



**b. How to Assign Departments in Business Locations?**

**Click on the Assign Department**

**Pop Up will appear**

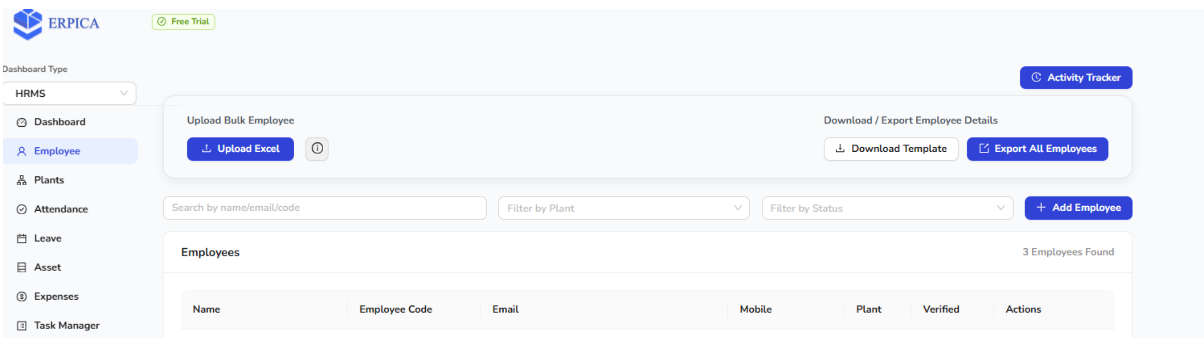
You can select a Business Location & the department to assign



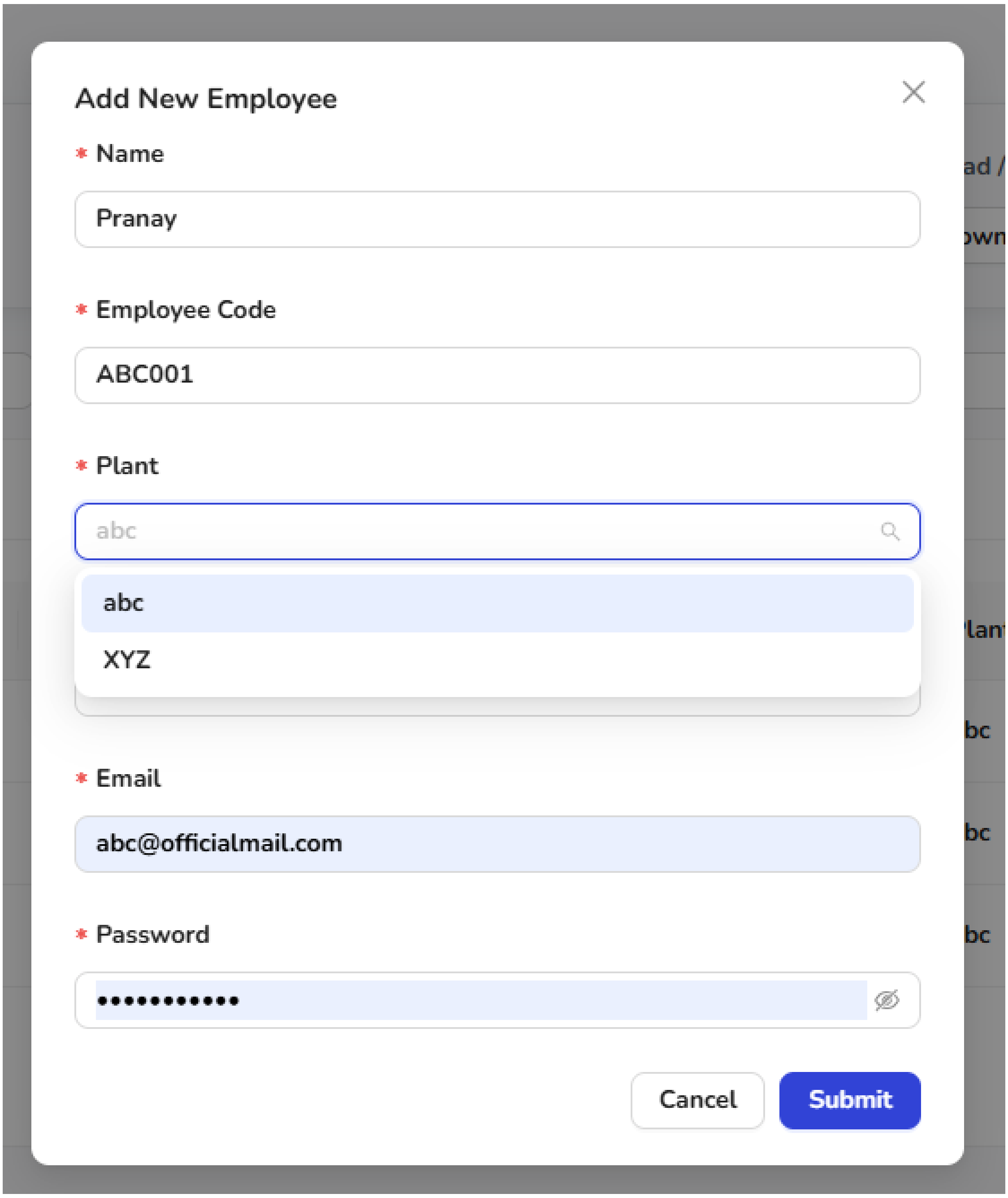

You can view assigned departments **business-location wise** by clicking on **View Assigned Department**.

## 6. Creating an employee in ERPICA

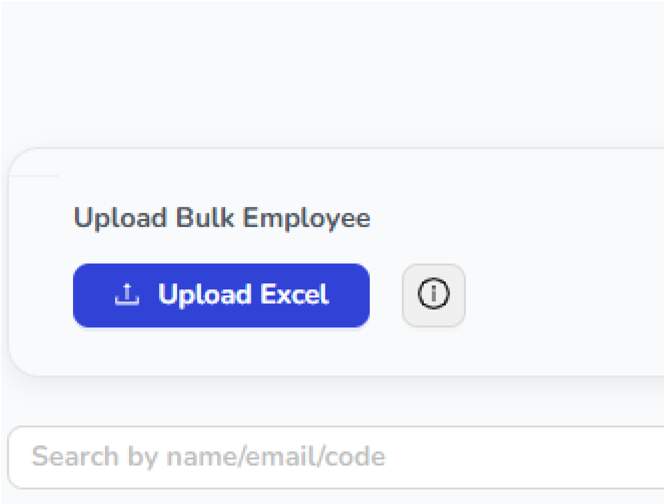
Employees can be created by the Owner, Admin, or any authorized employee who has permission to create employees, using the Employee tab in the HRMS Dashboard.



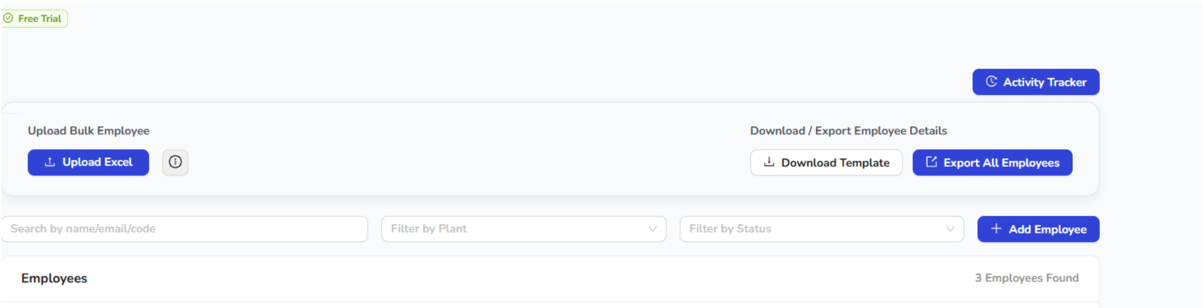
a. **Steps for Creating a new employee:**
   i. Go to HRMS → Employee from the left menu.
   ii. Click the + Add Employee button on the top right.
   iii. The Add New Employee popup will open. Fill in the details:
      - ➔ Name: Enter the employee's full name
      - ➔ Employee Code: Add a unique employee ID
      - ➔ Business Location: Select the business location where the employee is assigned
      - ➔ Mobile: Enter a valid mobile number
      - ➔ Email: Enter the official email ID
      - ➔ Password: Set a login password for the employee
   iv. Once all mandatory fields are filled, click Submit.
   v. The employee account is created and will appear in the employee list.
   vi. Email will be sent to the registered Employee email Id.



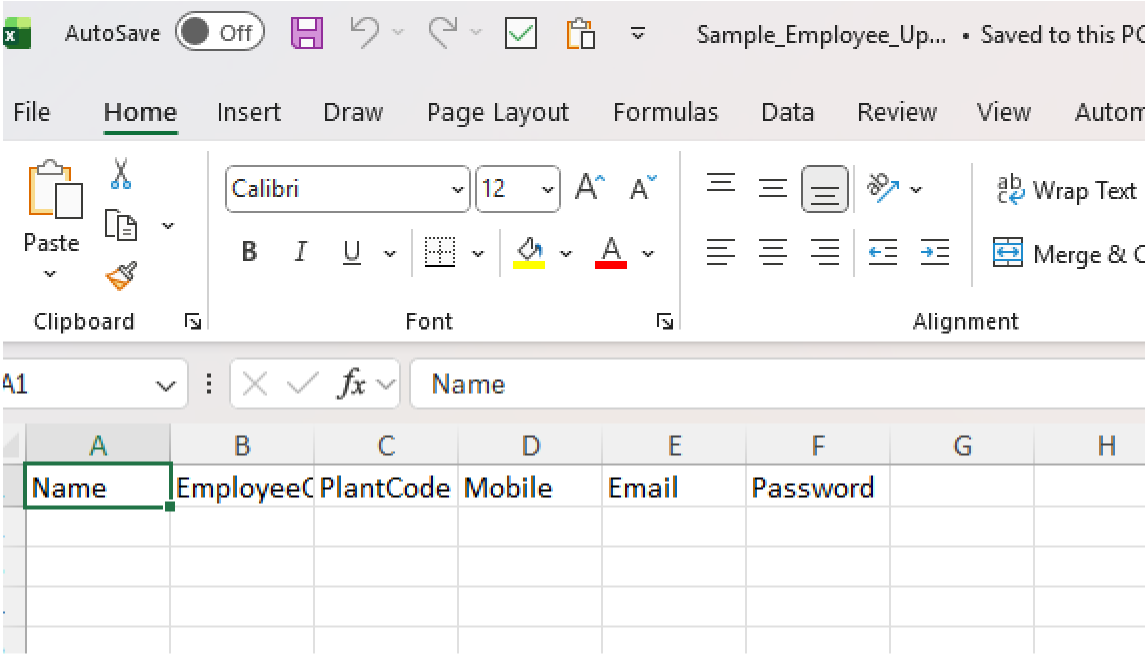

b. **Bulk Employee Creation**




ERPICA also provides a Bulk Employee Upload option, which allows you to upload large amounts of employee data at once.



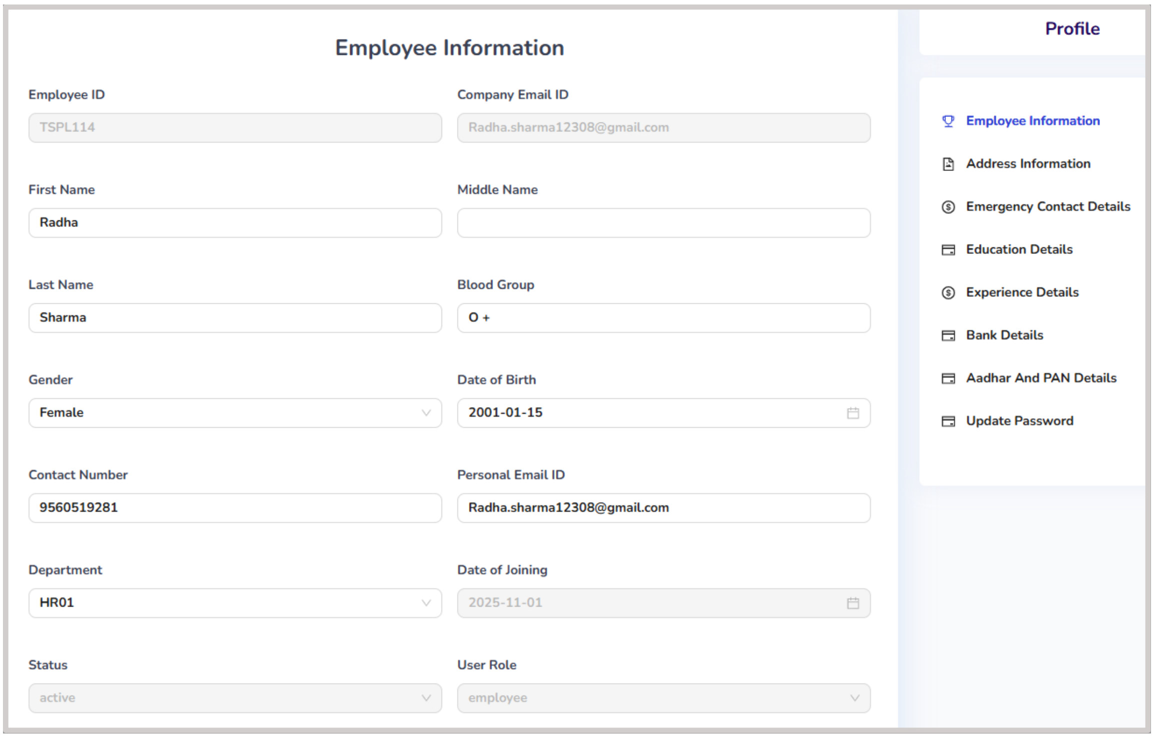

For bulk upload, download the template and fill in the required details in the Excel sheet.




Once an employee is assigned to a business location, they can continue working under that specific business location. However, if their role or business locations requirement changes, they can easily be transferred to another business location as needed. This ensures smooth workflow management and flexibility for companies handling multiple business locations .

**c. Employee Details**

From the Employee tab, you can view registered employees business-location wise and check detailed employee information by clicking the View icon in the Action column.




Employee Details includes these:

- Employee Information
- Address Information
- Emergency Contact Details
- Education Details
- Experience Details
- Bank Details
- Aadhar and PAN Details
- Update Password
- Transfer Employee
- Add Permissions

### Employee Information

On the Employee Information page, add and manage employee details as shown in the screenshot. This page allows you to:

### Employee Management Actions

**Assign Supervisor**

**Change Role**

**Assign Department**

All changes made here help ensure proper reporting structure, access control, and accurate employee assignment within the organization.

**Address Information**

Add the permanent and present address details as shown in the screenshot. The system also allows you to track changes in the present address whenever it is updated.

**Emergency Contact Details**

Fill in the required emergency contact information and click Update to save the details.

**Education Details**

Add employee education details **sequence-wise**, along with uploading the **required supporting documents**, and save the information for record verification.

**Experience Details**

Add experience details **sequence-wise**, along with uploading the **required supporting documents**, and save the information for record verification.

**Bank Details**

Add and update employee bank account information for salary and payment processing.

**Aadhaar & PAN Details**
Enter and manage Aadhaar and PAN information along with the required documents for verification.

**Update Password**

Update the Employee account password by providing the new password and confirm the new password.

**Transfer Employee**

This feature allows users to transfer employees business-location wise and department wise within the organization. Employees can be moved to another department or reassigned within the current business location.

During the transfer, you can choose to transfer the employee with full permissions and data or without them, based on operational requirements.

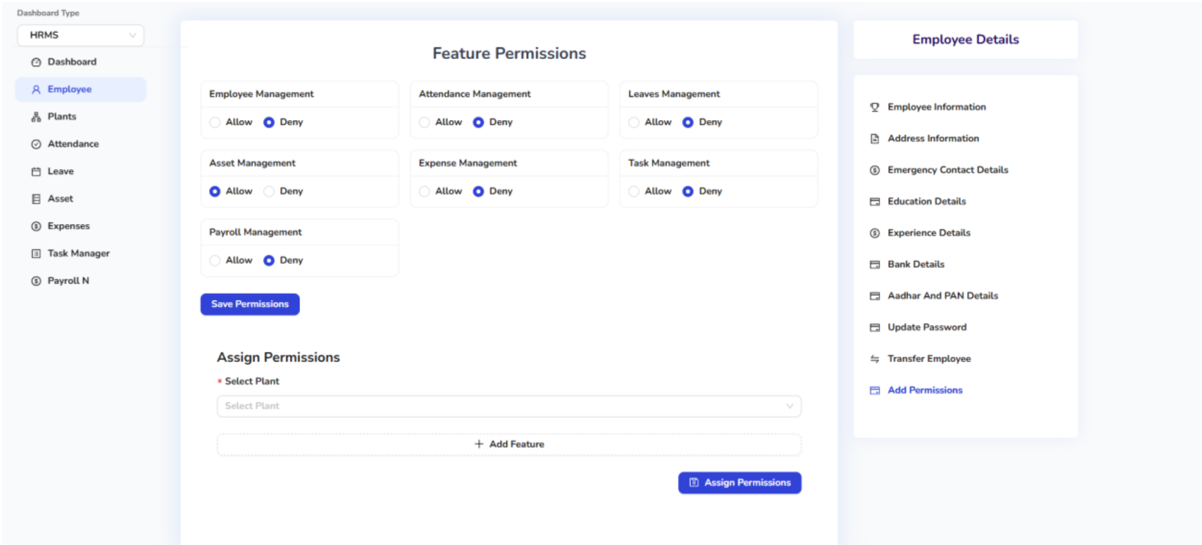
**Add Permissions**

From Add Permissions, you can assign employee access module-wise such as Attendance, Leave, Expenses, and more.

You need to select the Business Location and then define which features the employee can access. For each feature, permissions can be set as Read Only or Read & Write, based on the employee's role and responsibility.

**Steps to Add Permissions**

Simply click on the required **feature**, select the **Business Location(s)** where access should be given, and choose the permission level — **Read** or **Read & Write**.

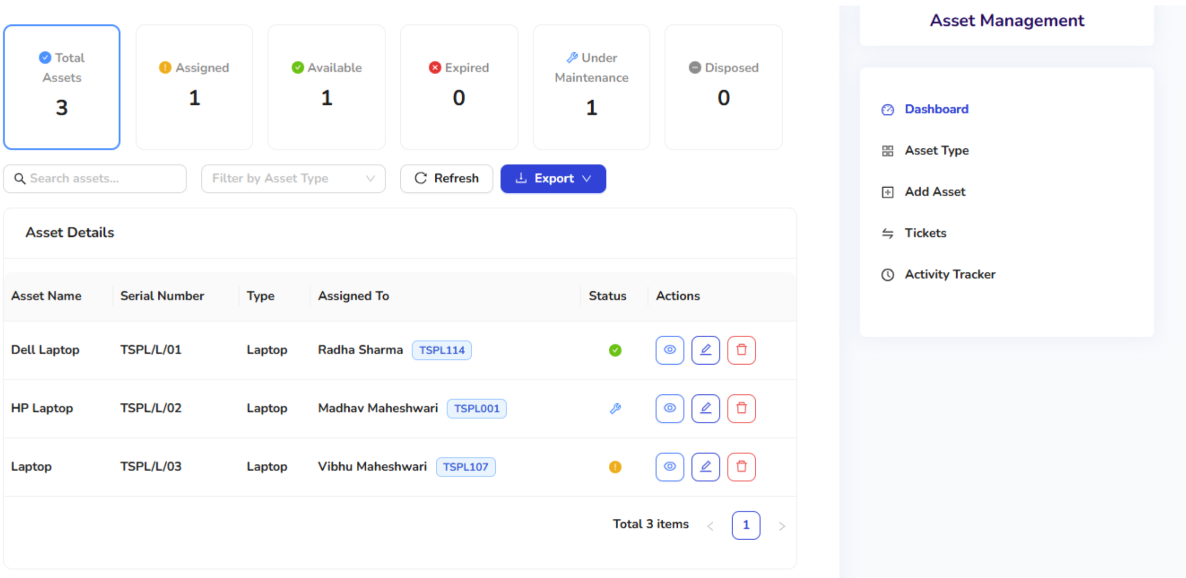



# 7. Assets

Assets are items owned by a company that have value and are used for business operations.

**Common examples of assets:**

- Computer/ Laptop/Monitors with accessories, Mobile phones, Vehicles
- Computer Software, including Virus protection
- Labeling equipment
- Copier, Printer, Scanner
- Telephone
- Internet
- Projector
- Tools and devices
- Stamps and Postage
- Office furniture etc.

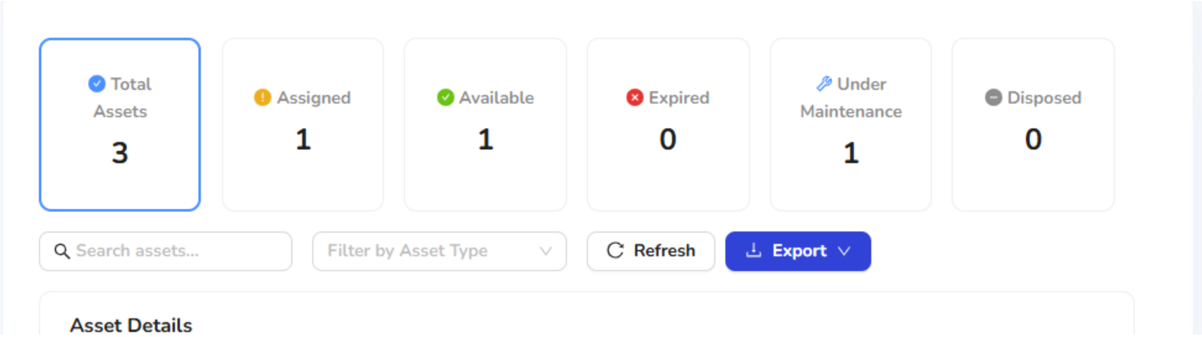



The table displays details such as asset information, status, request date, reason and available actions.

<u>Assets are tracked so the company knows:</u>

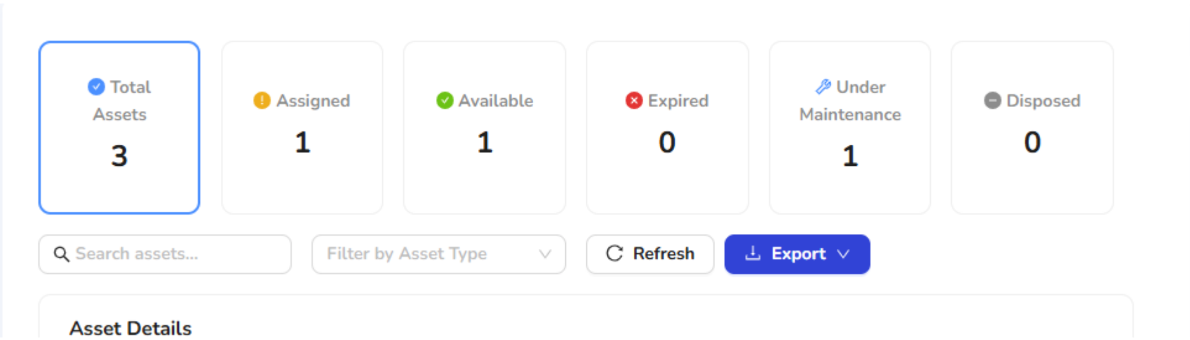
- Who is using which asset
- Where the asset is assigned
- Asset condition and status

- Return or transfer history

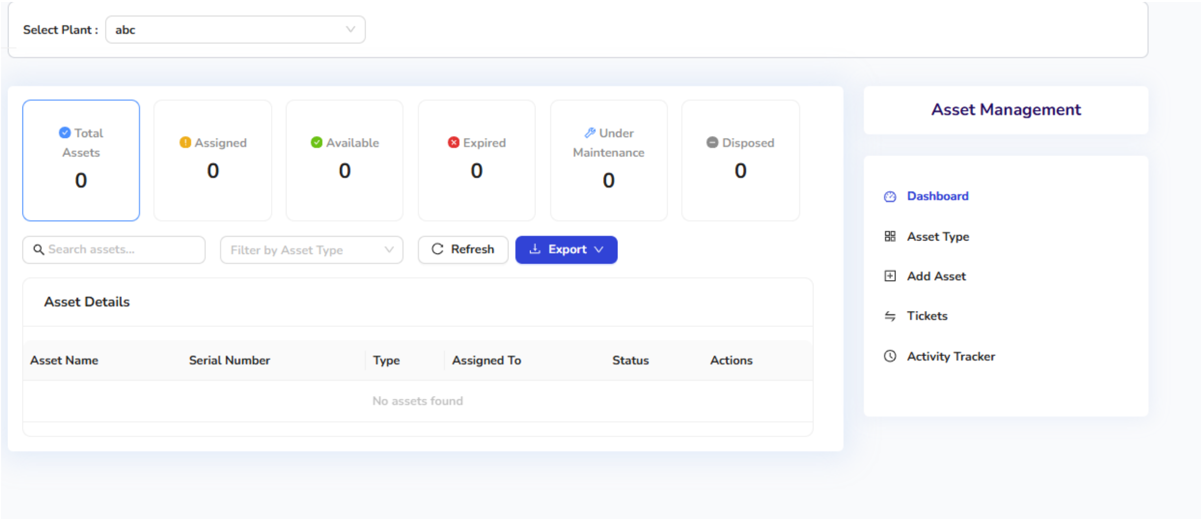



This section gives you a quick snapshot of all company assets. You can instantly see how many assets are assigned, available, expired, under maintenance or disposed. You can also search for any asset, filter by asset type, refresh the list or export the data whenever needed. It helps you keep track of everything in one place with complete clarity.

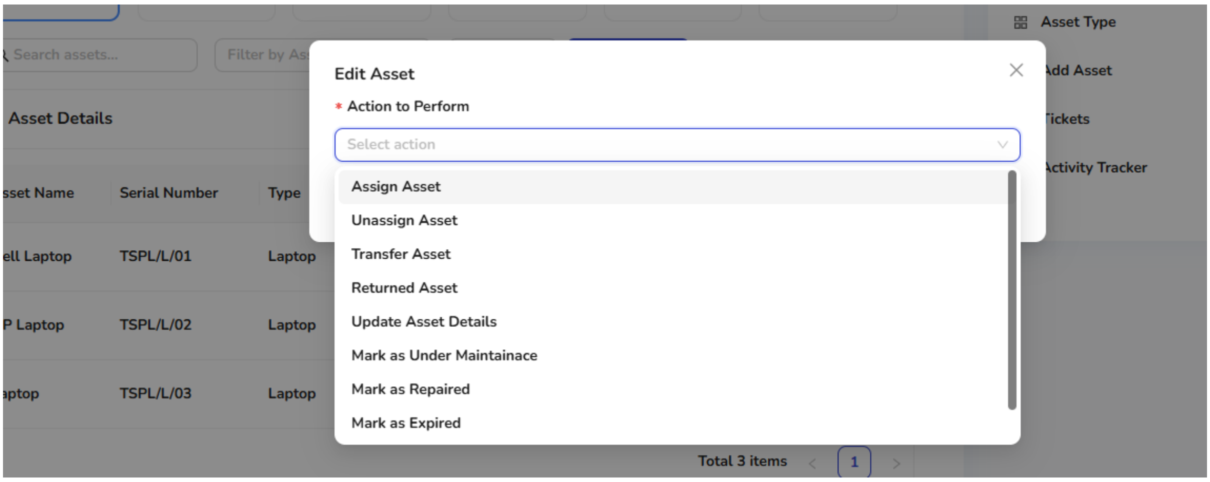
a. **Dashboard:**



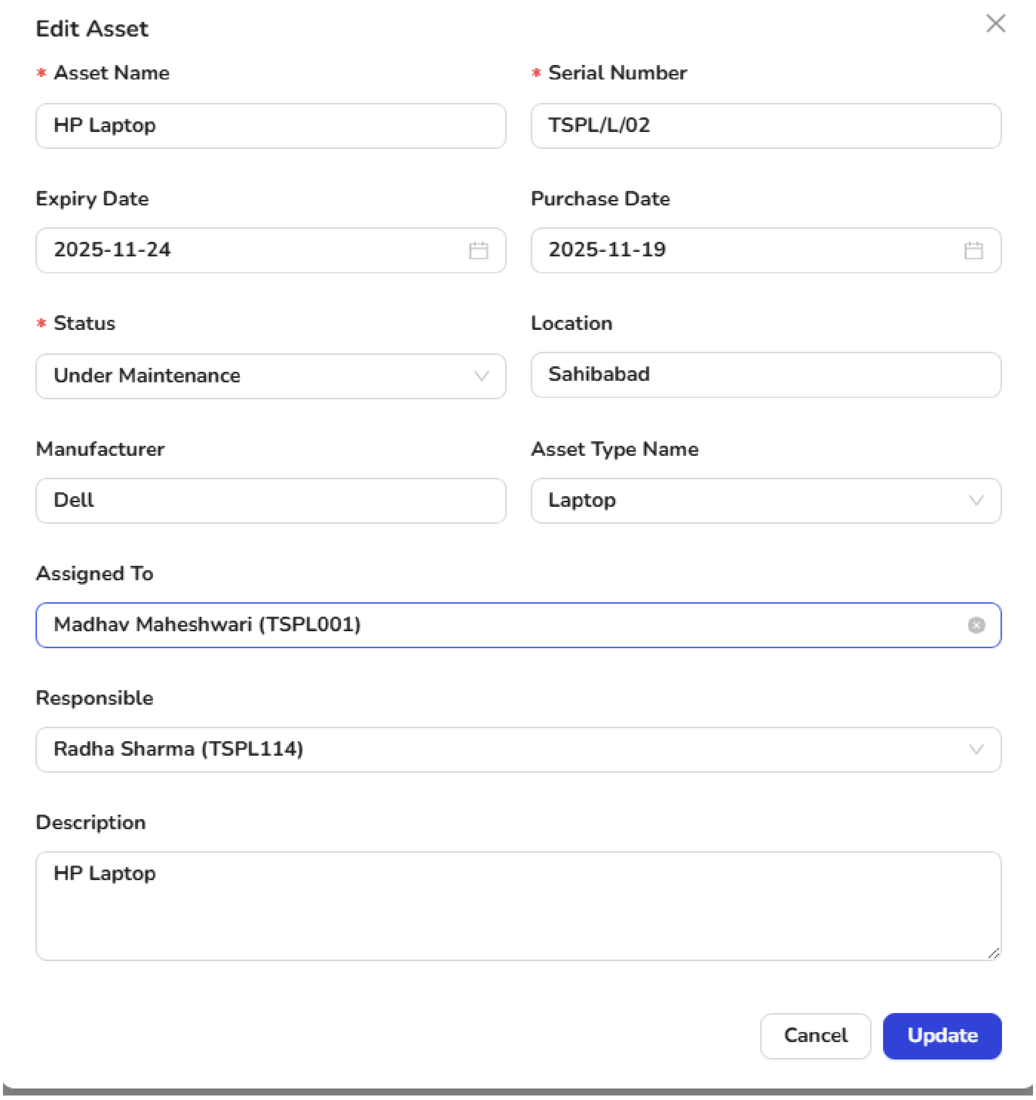

This section gives you a quick snapshot of all company assets. You can instantly see how many assets are assigned, available, expired, under maintenance or disposed. You can also search for any asset, filter by asset type, refresh the list or export the data whenever needed. It helps you keep track of everything in one place with complete clarity.

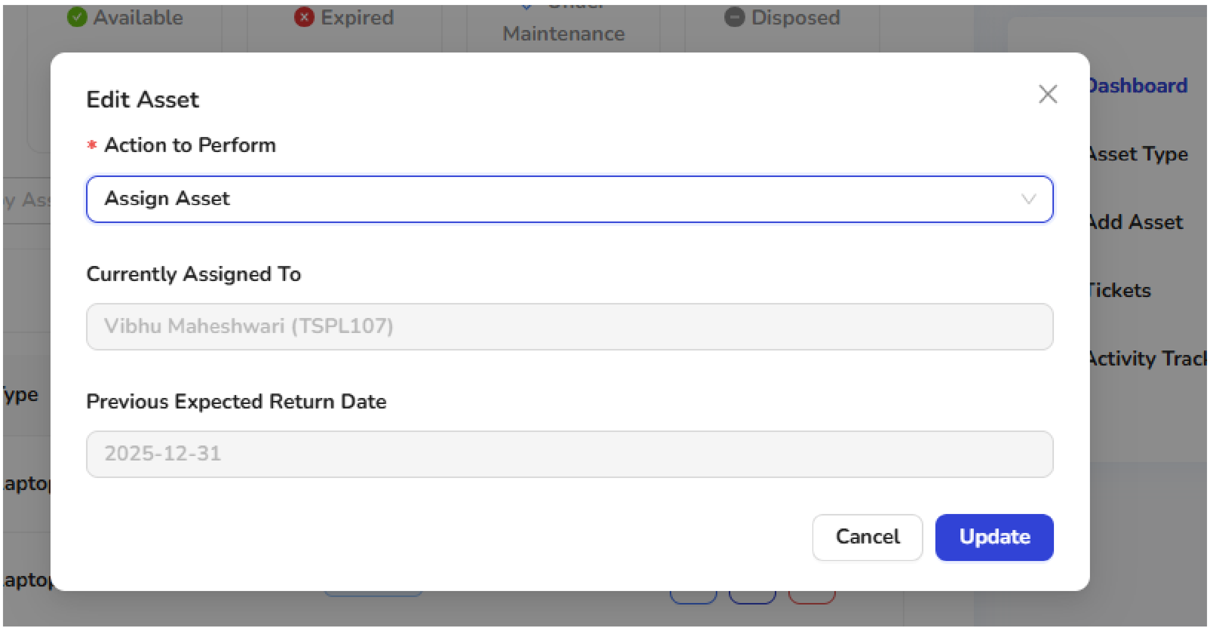



## Editing the Assets details:

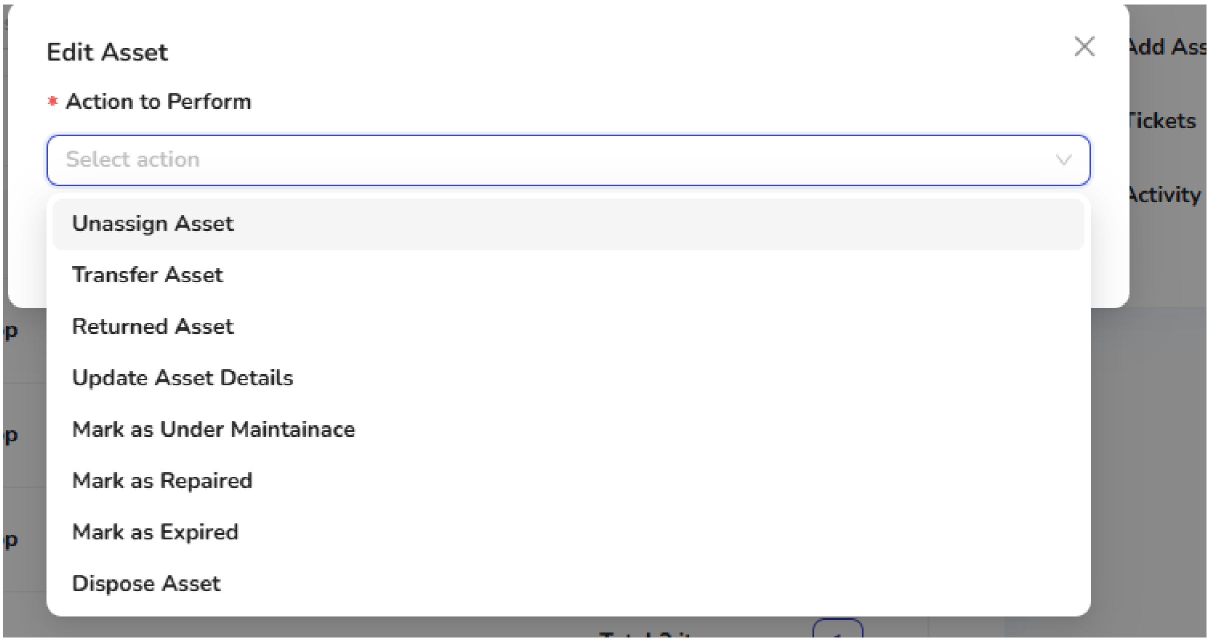



These options are available for the owner to set the current status of the asset.

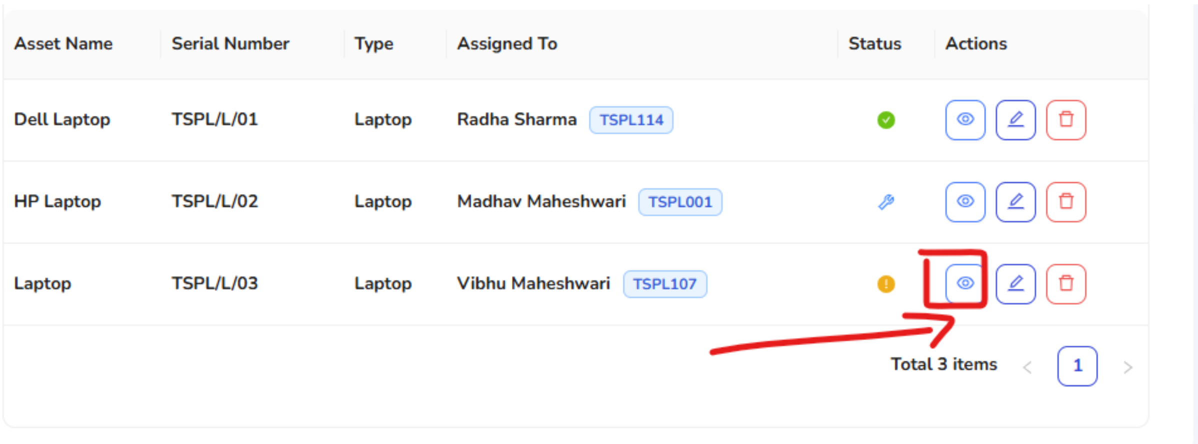

Edit Asset
* Asset Name
HP Laptop
* Serial Number
TSPL/L/02
Expiry Date
2025-11-24
Purchase Date
2025-11-19
* Status
Under Maintenance
Location
Sahibabad
Manufacturer
Dell
Asset Type Name
Laptop
Assigned To
Madhav Maheshwari (TSPL001)
Responsible
Radha Sharma (TSPL114)
Description
HP Laptop
Cancel
Update


Available
Expired
Maintenance
Disposed
Dashboard
Asset Type
Add Asset
Tickets
Activity Track
Edit Asset
* Action to Perform
Assign Asset
Currently Assigned To
Vibhu Maheshwari (TSPL107)
Previous Expected Return Date
2025-12-31
Cancel
Update

- Once you have already assigned an asset to an employee, you cannot reassign it to someone else until it is officially transferred from the current holder.
- If you unassign an asset from an employee, make sure to mention the previous return date or the date on which the employee was supposed to return it.



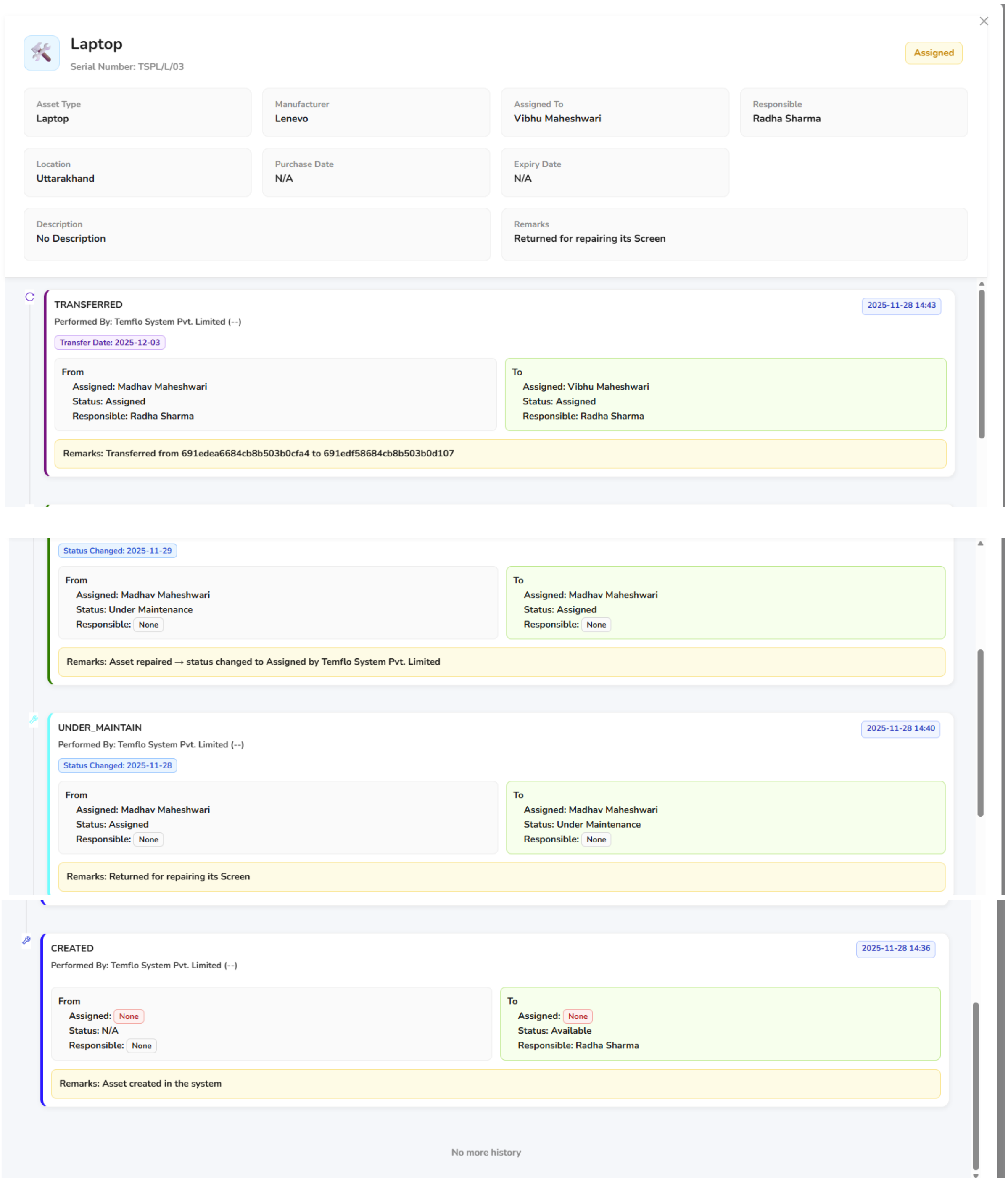

- For any other actions such as assigning, unassigning, putting an asset under maintenance, repairing it, transferring it, or marking it as expired (as shown in the image), you must provide the **relevant dates**. This includes dates for maintenance, repairs, returns, transfers, or any status changes.



| Asset Name | Serial Number | Type | Assigned To | Status | Actions |
|---|---|---|---|---|---|
| Dell Laptop | TSPL/L/01 | Laptop | Radha Sharma TSPL114 | | |
| HP Laptop | TSPL/L/02 | Laptop | Madhav Maheshwari TSPL001 | | |
| Laptop | TSPL/L/03 | Laptop | Vibhu Maheshwari TSPL107 | | |

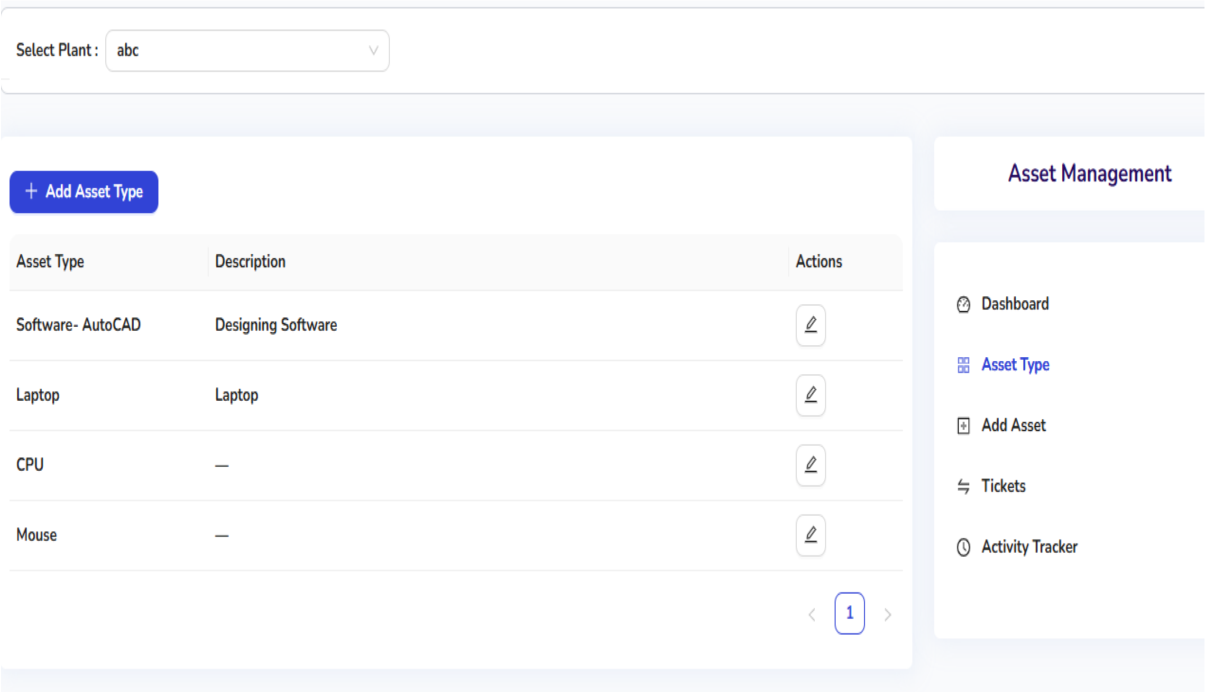
Total 3 items 1

The status of any asset can be viewed based on its complete history, including assigning, transferring, repairing, or any other updates made to it.



b. **Asset Type:**

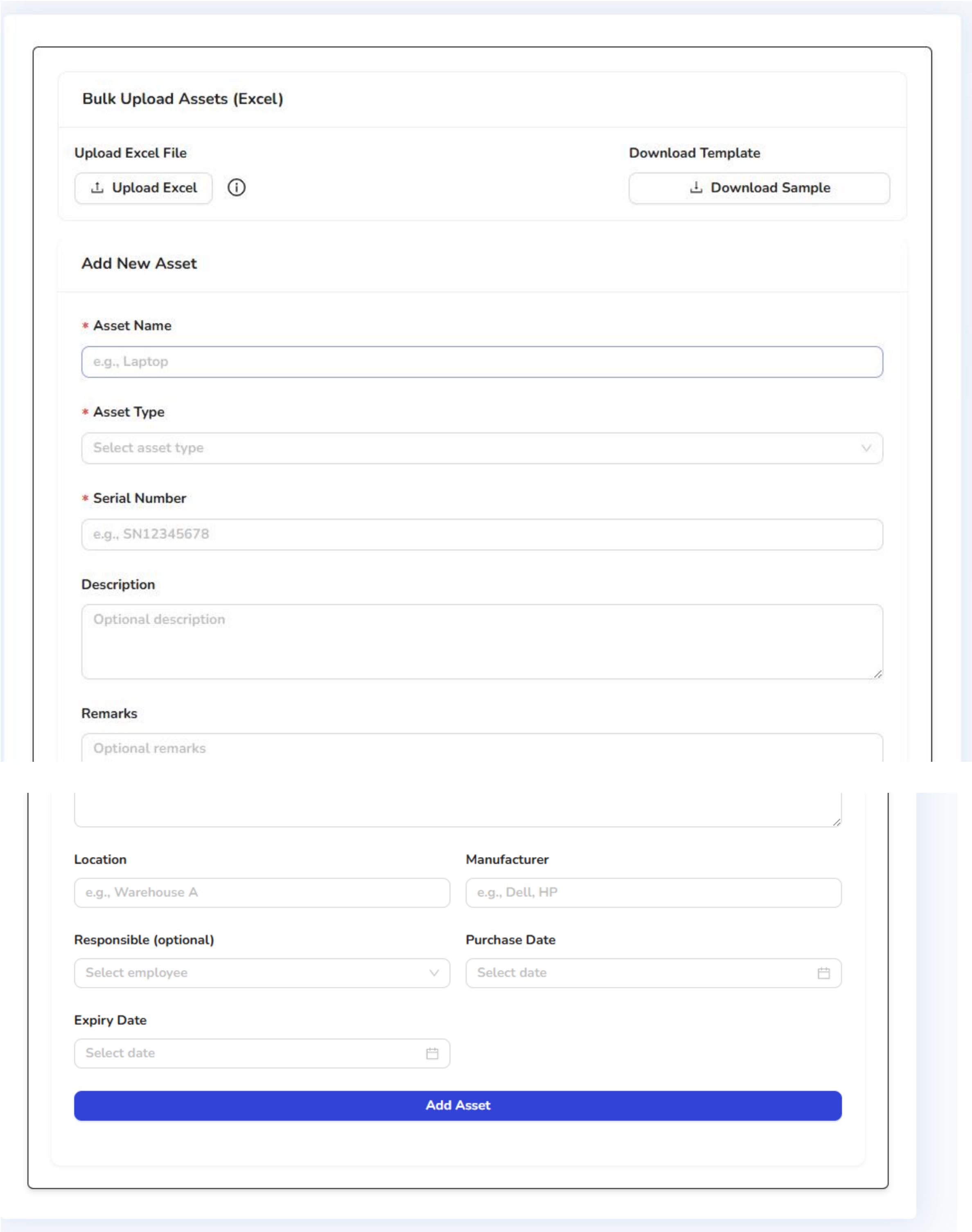
Mention the type of assets you have (whether it is a software/equipment/any device)




For adding any assets to the company, mention the purchase date, expiry date and return date. You can also mention its company serial number and the unique serial number of the asset.

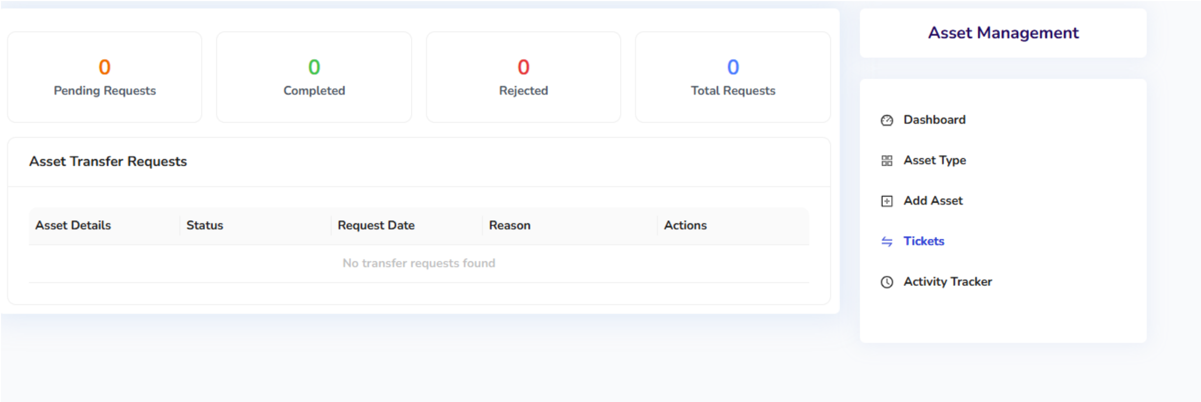
c. **Bunk Uploads**

d. **Add Asset**




In the Description & Review Sections, you can mention any notes or additional details.

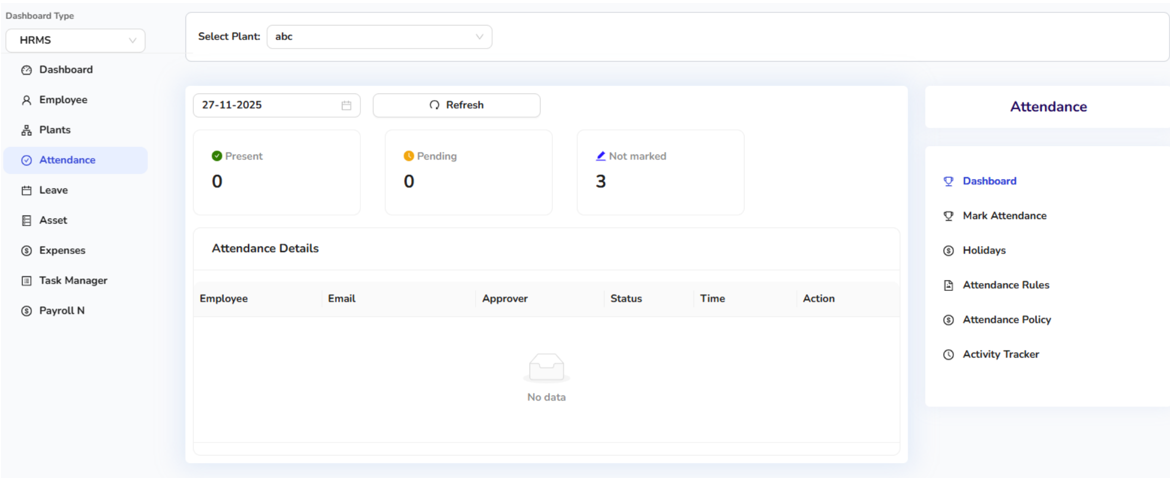
### e. Tickets




This section shows all asset transfer requests for the selected plant. You can view the number of pending, completed, rejected and total requests. If there are no transfer requests, the table will show a message accordingly.

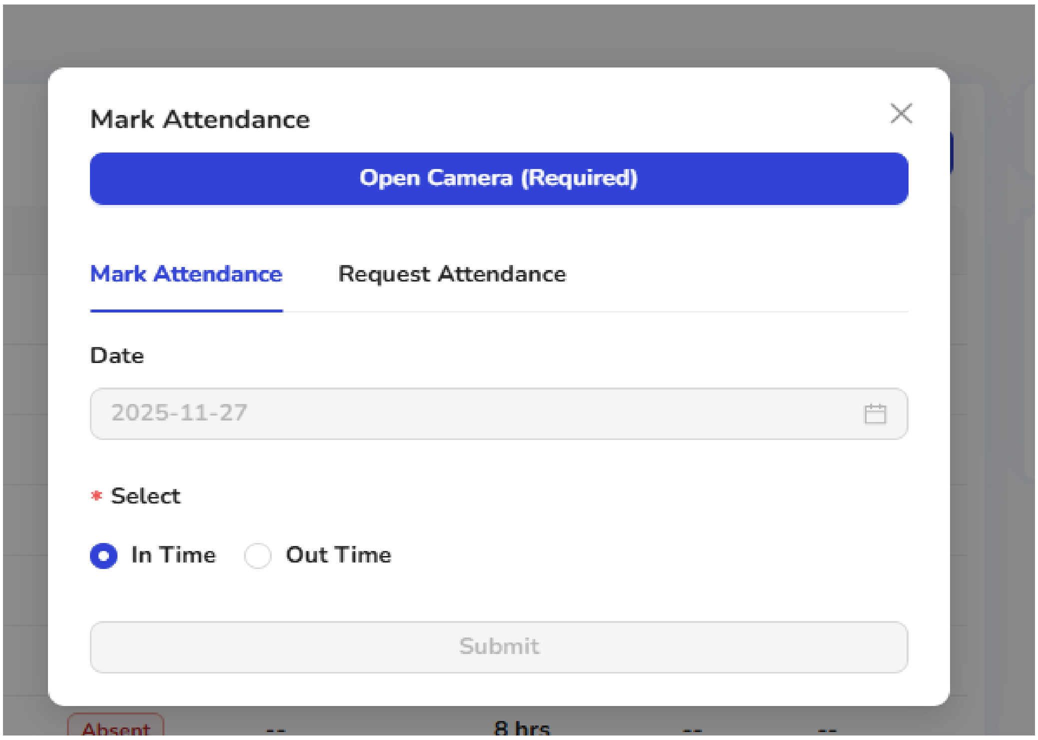
# 8. Attendance

## a. Dashboard




The Attendance dashboard gives you a quick and clear view of who is present, pending for approval and who hasn't marked their attendance yet. The owner/Admin can simply select the plant, choose the date and refresh the data anytime. All employee attendance details like approver, status and time appear in one place, making it super easy to track daily attendance without any confusion. It's designed to help the owner/Admin monitor everything smoothly and keep the workflow on point.

### b. Mark Attendance




To mark attendance, the employee needs to follow the rules set by the owner. If location based marking is enabled, the employee must be within the assigned radius to check in or check out.

If the owner has enabled the camera requirement, the employee will need to open the camera before submitting attendance. The system will automatically capture the employee's current location, time and photo through the device's camera to ensure everything matches the company's attendance rules.

### c. Holidays

Company holidays are days when the office is closed and employees are not required to work. Company holidays are officially approved non-working days declared by the organization for all or specific employees. These are used for attendance and leave calculations which helps avoid marking employees absent on official off days.

Common types of company holidays are

- National holidays (like Republic Day, Independence Day)

- Festival holidays (Diwali, Holi, Eid, etc.)
- Company-declared holidays
- Regional or state-specific holidays

**d. Attendance Rules**

It refers to the Individual Rule. These rules can be set separately for each employee based on their shift, timing or unique requirements.

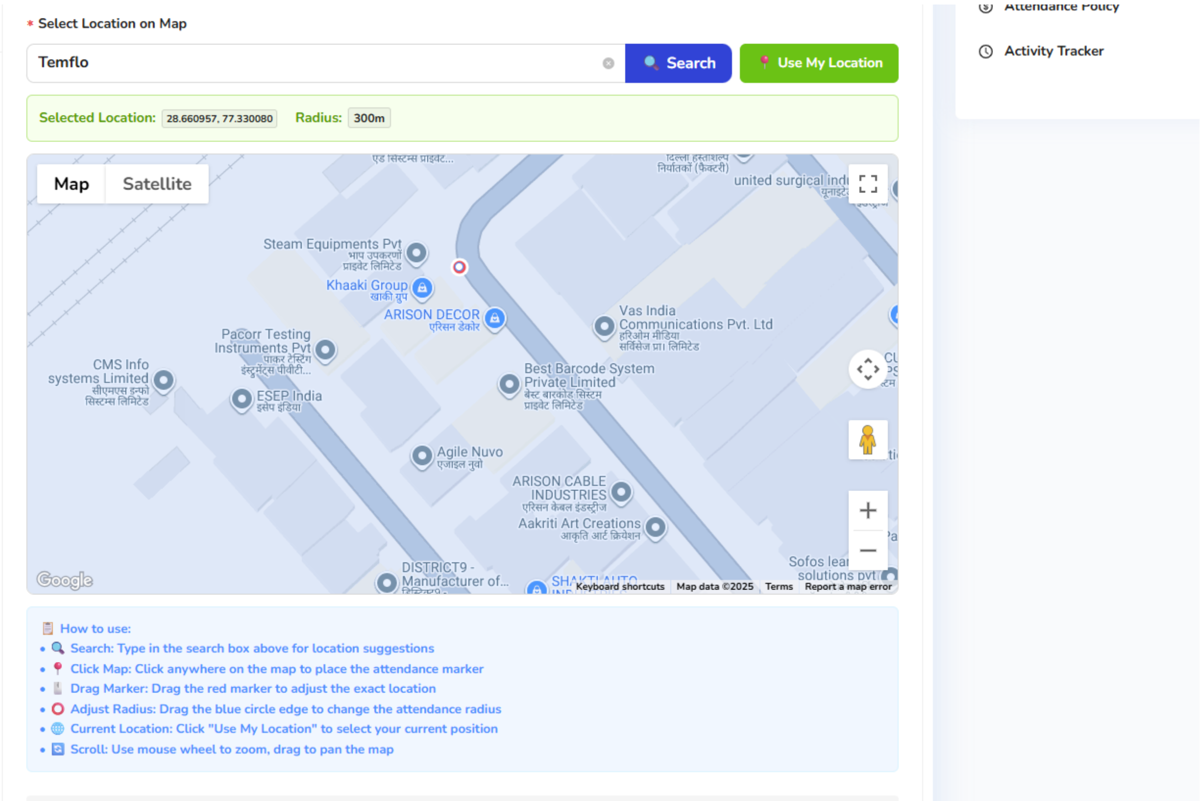
**e. Attendance Policy**

Attendance Policy is a one time policy that applies to everyone in the company. It sets the common guidelines that all employees will follow.

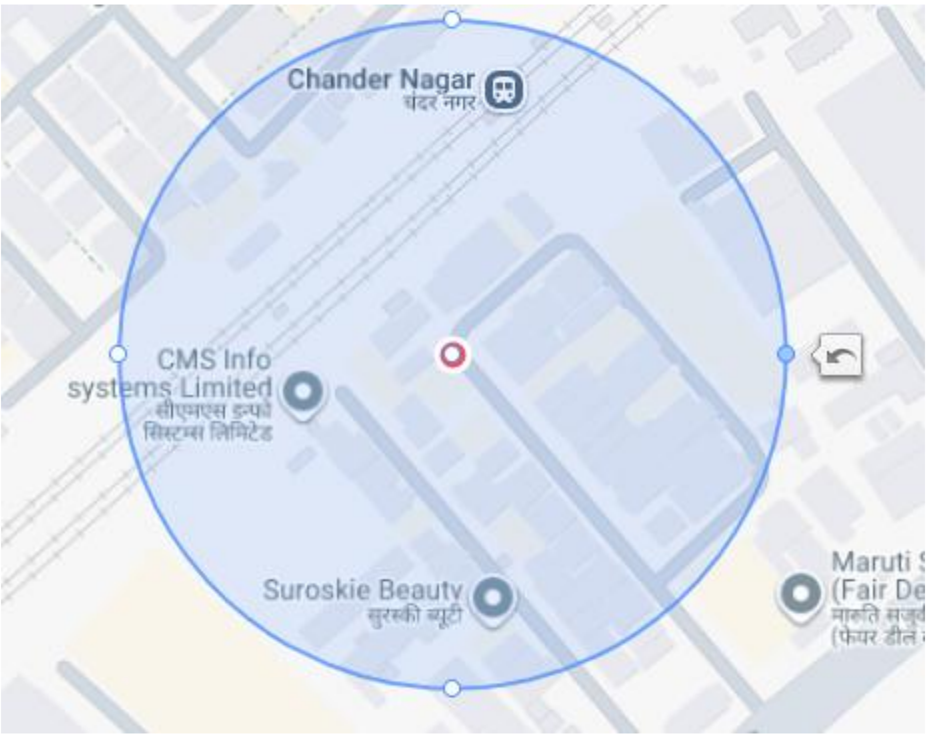
This section lets you set up Employee Attendance Rule**s** for each individual team member. You can select an employee from the dropdown and customize how their attendance should work.

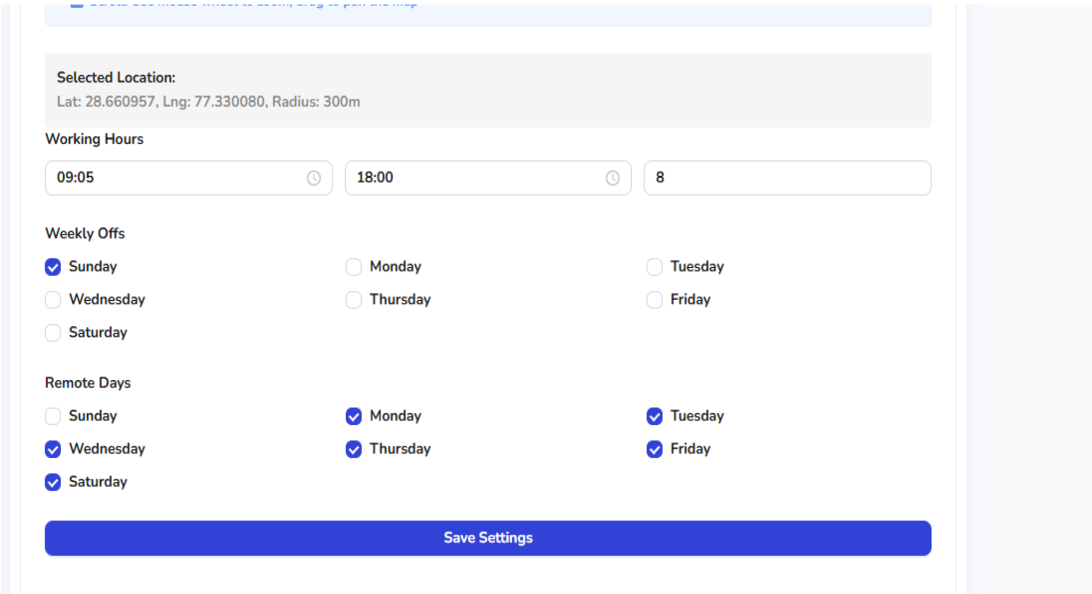
Owner can control settings like:

- Location Based: Attendance can only be marked when the employee is within the assigned location.
- Approval Required: If turned on, their attendance will need approval from a manager.
- Enable Marking: Allows the employee to mark their attendance for the day.
- Photo Capture Required: Makes it compulsory for the employee to click a photo while marking attendance.
- Select Location on Map: When location based is active, you can set the exact location where attendance is allowed.

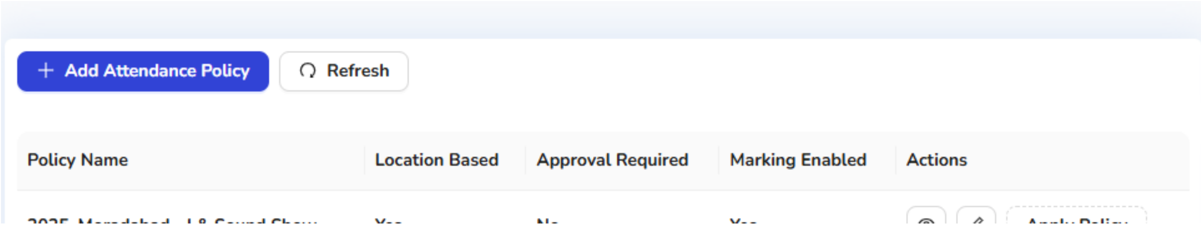



The owner can set or adjust the employee's marking location by increasing or reducing the allowed marking distance. The system tracks the employee's attendance based on this radius. If the employee marks their attendance outside the defined area, it will be counted as not okay. The system automatically detects whether the employee is within the approved radius at the time of marking.



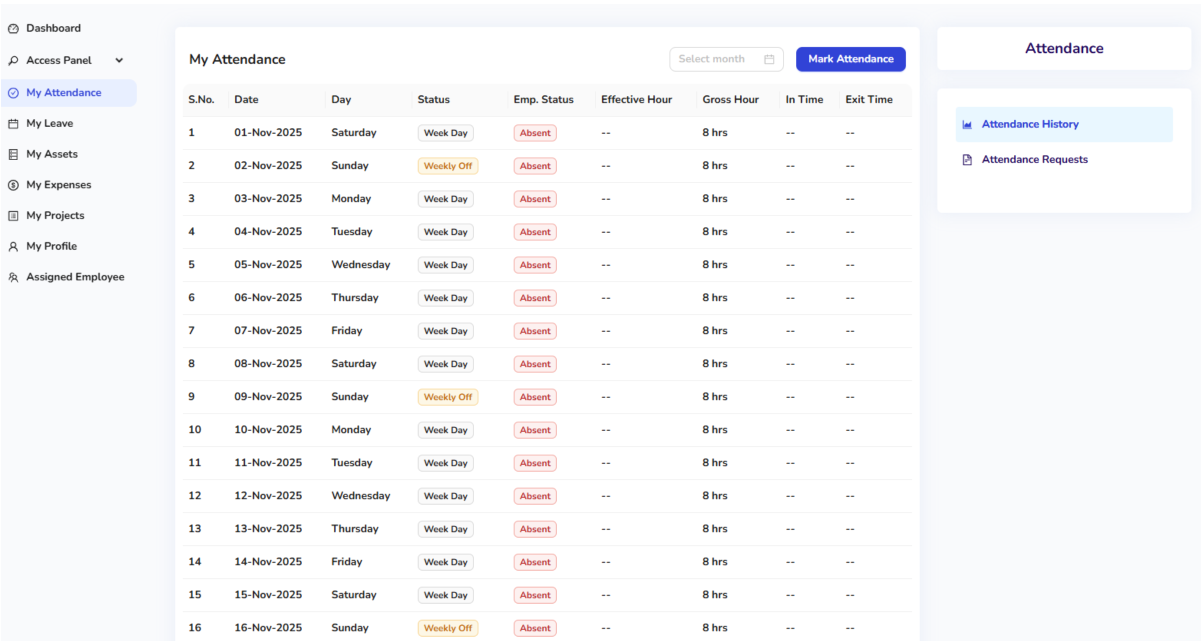

The admin can set customized working hours and location rules for each individual employee. This includes defining the employee's daily working time, selecting weekly off days, and assigning specific remote working days if needed. These personalized settings help ensure accurate tracking and flexible scheduling for every em ployee.




The owner has full authority to update or modify the attendance policy whenever required, ensuring the rules stay aligned with the company's operational needs.

### f. Approvals

The owner also has the authority to mark an employee's attendance in case the employee forgets to check in. When the owner marks it manually, there is no need for any photo or camera verification. The owner can simply update the attendance directly without any additional requirements.




| S.No. | Date | Day | Status | Emp. Status | Effective Hour | Gross Hour | In Time | Exit Time |
|---|---|---|---|---|---|---|---|---|
| 1 | 01-Nov-2025 | Saturday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 2 | 02-Nov-2025 | Sunday | Weekly Off | Absent | -- | 8 hrs | -- | -- |
| 3 | 03-Nov-2025 | Monday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 4 | 04-Nov-2025 | Tuesday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 5 | 05-Nov-2025 | Wednesday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 6 | 06-Nov-2025 | Thursday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 7 | 07-Nov-2025 | Friday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 8 | 08-Nov-2025 | Saturday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 9 | 09-Nov-2025 | Sunday | Weekly Off | Absent | -- | 8 hrs | -- | -- |
| 10 | 10-Nov-2025 | Monday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 11 | 11-Nov-2025 | Tuesday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 12 | 12-Nov-2025 | Wednesday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 13 | 13-Nov-2025 | Thursday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 14 | 14-Nov-2025 | Friday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 15 | 15-Nov-2025 | Saturday | Week Day | Absent | -- | 8 hrs | -- | -- |
| 16 | 16-Nov-2025 | Sunday | Weekly Off | Absent | -- | 8 hrs | -- | -- |

## 9. Expenses

Company expenses are costs incurred by employees or the organization while carrying out its business operations.

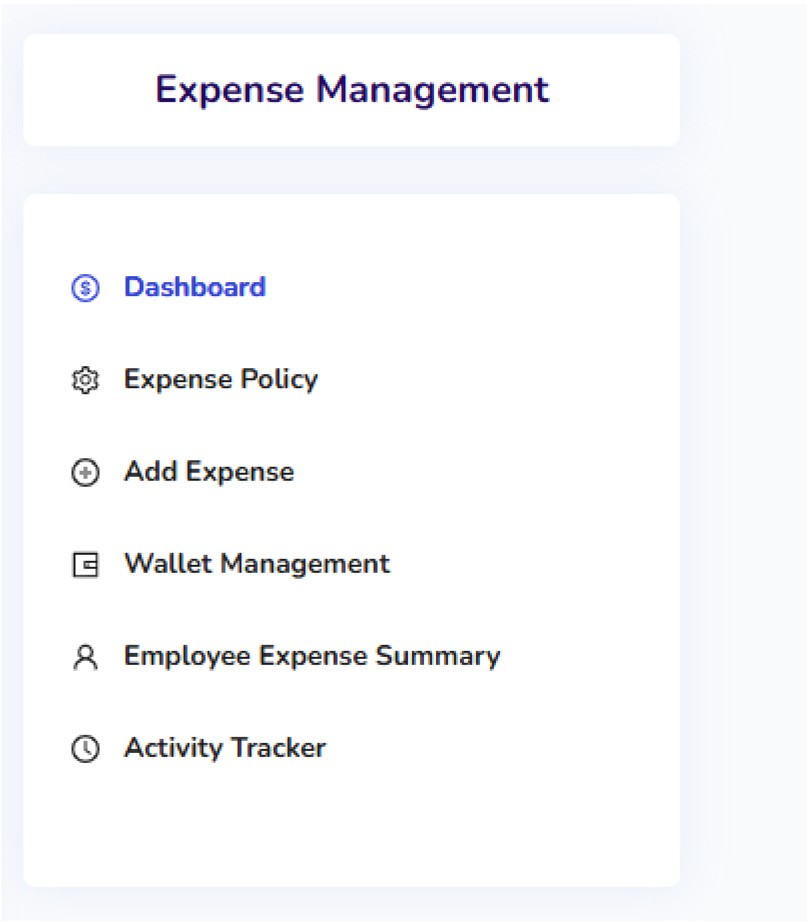
**Common examples of company expenses**

- Travel and conveyance
- Food and accommodation during official travel
- Office rent and utilities
- Internet and phone bills
- Stationery and office supplies
- Client meetings and events
- Reimbursements to employees etc

**Process for Expenses submission and reimbursements:**

- Employees submit expense claims
- Managers or Admins review and approve them
- Approved expenses are reimbursed or accounted for
- Helps track and control company spending

**Quick Navigation Panel in ERPICA includes;**



### a. Dashboard

The Expense Management Dashboard in ERPICA provides a complete overview of all employee expenses in one place. It helps Admins and Owners track, review, and manage expenses efficiently.

**Key features of the dashboard**

- Plant Selection
  Users can filter expense data by selecting a specific plant to view plant-wise expenses.

- Expense Summary Cards
  - **Total Expenses**: Total number of expenses submitted
  - **Under Review**: Expenses pending approval
  - **Claimed**: Expenses already claimed or approved
  - **Rejected**: Expenses that have been declined

- Amount Overview
  - **Total Expense Amount**: Total value of all submitted expenses
  - **Claimed Amount**: Amount already reimbursed or approved
  - **Remaining Amount**: Balance amount yet to be claimed or processed

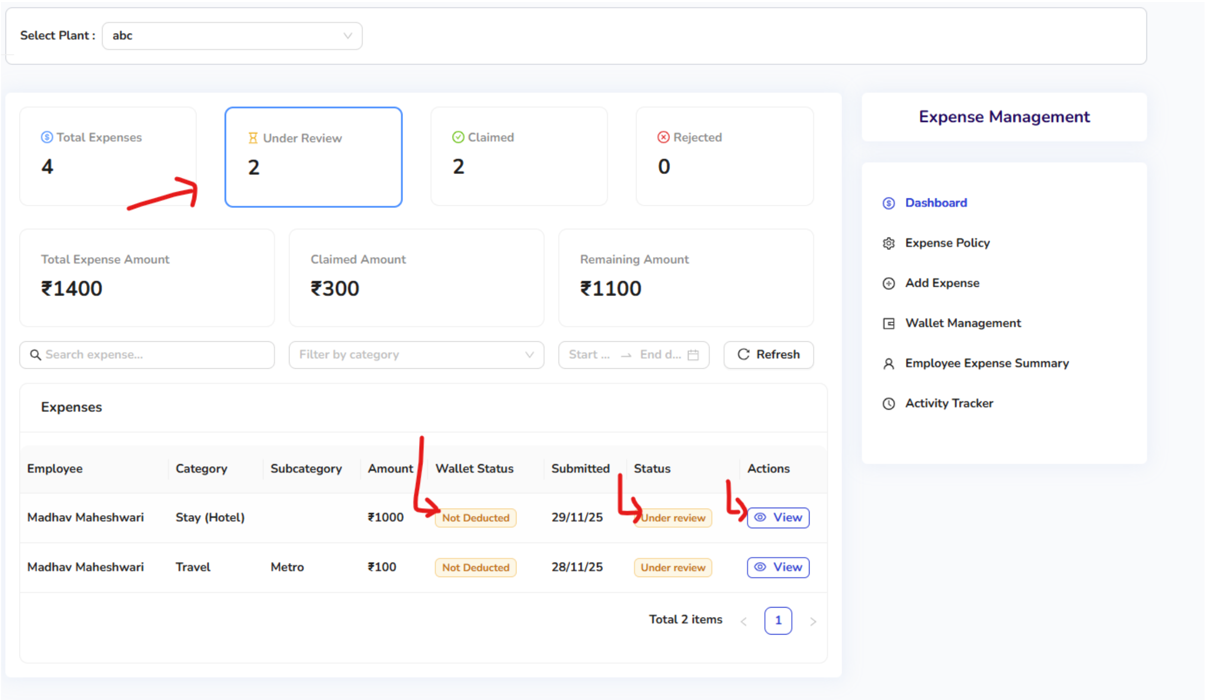
- Search and Filters
  Users can search expenses, filter by category, and select a date range to quickly find specific records.

- Expense List Table
  Displays detailed expense information including:
  - Employee name
  - Expense category and subcategory
  - Amount
  - Wallet status (Deducted or Not Deducted)

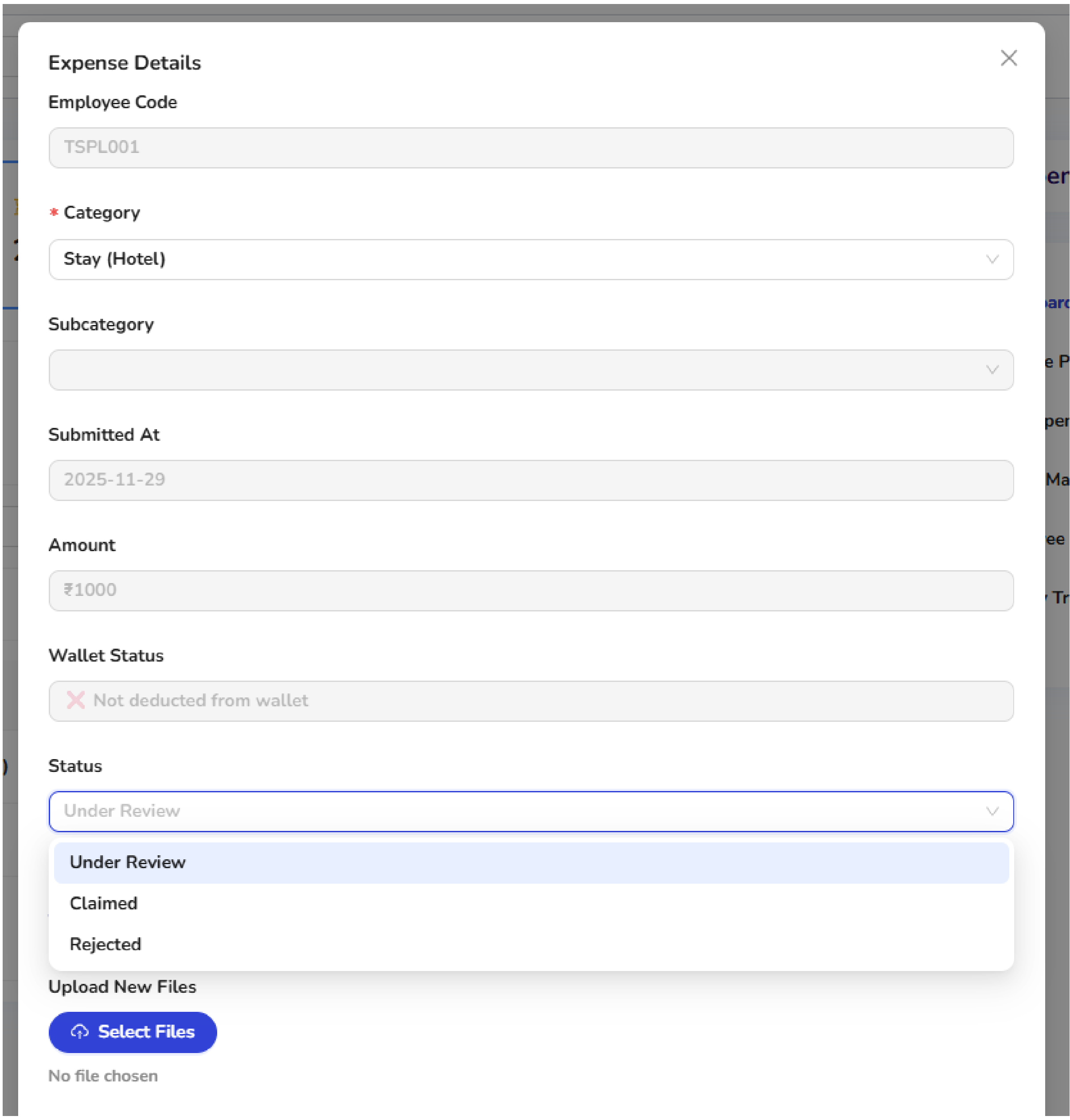
➢ Submission date

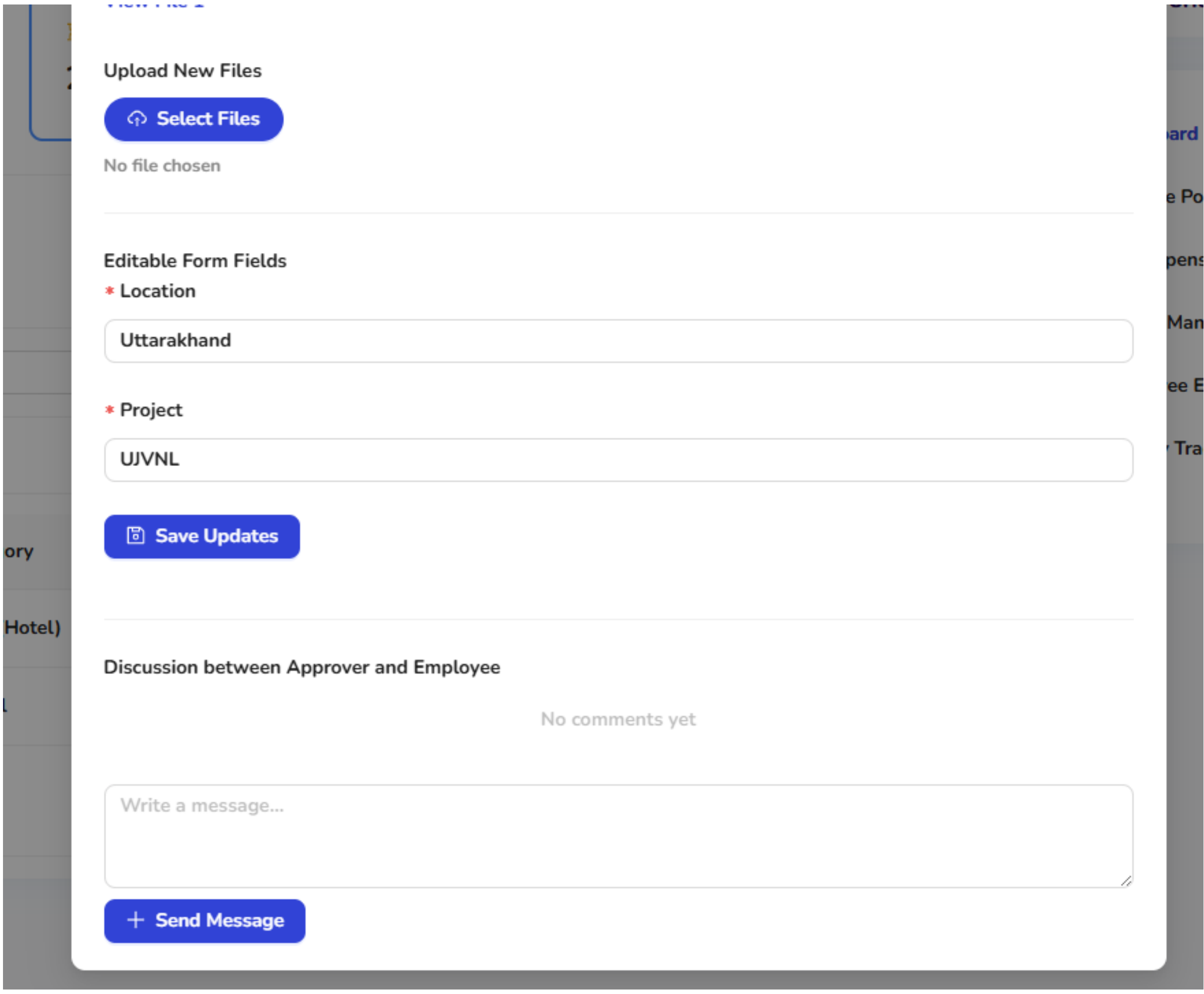
➢ Approval status

➢ Action button to view details




<u>For Owner's approval:</u>

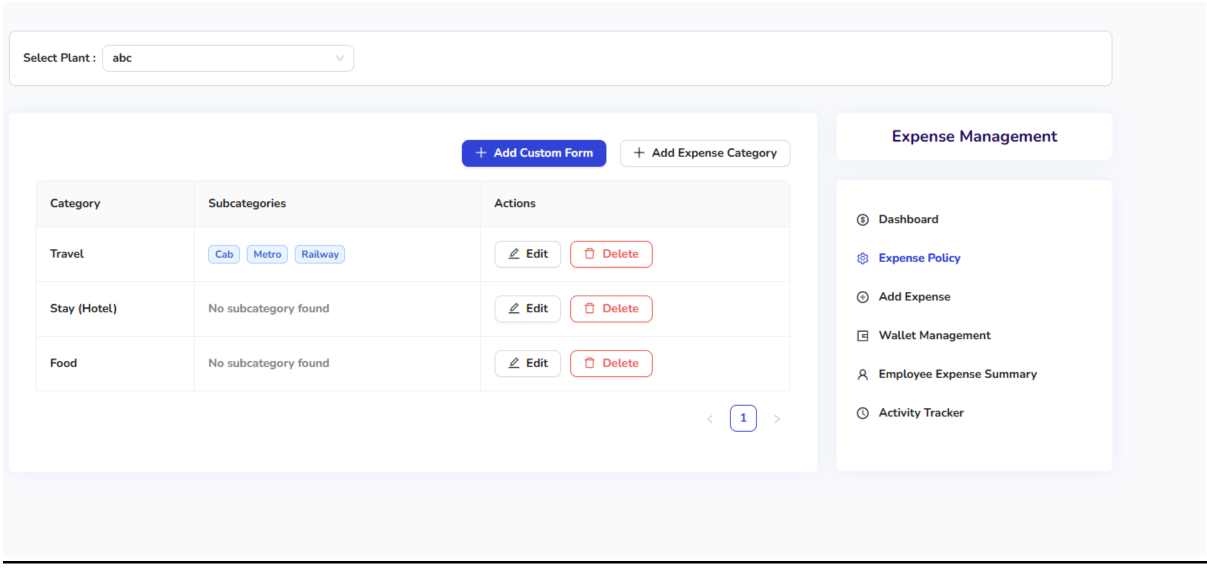

Expense Details
Employee Code
TSPL001
* Category
Stay (Hotel)
Subcategory
Submitted At
2025-11-29
Amount
₹1000
Wallet Status
Not deducted from wallet
Status
Under Review
Under Review
Claimed
Rejected
Upload New Files
Select Files
No file chosen




If the employer does not want to approve the expense for any reason, they can ask for additional details in the "Discussion between Approver and Employee" section.

**b. Expense Policy**

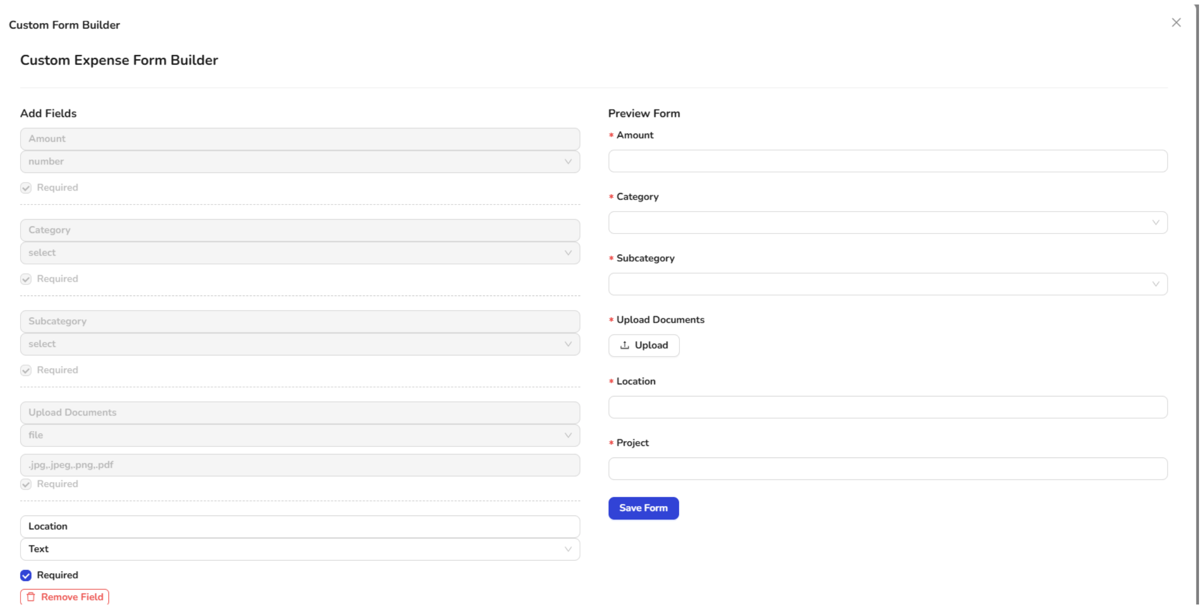
It means managing the company expenses that are provided to employees for their travel, stay, or food during site visits or site stays.



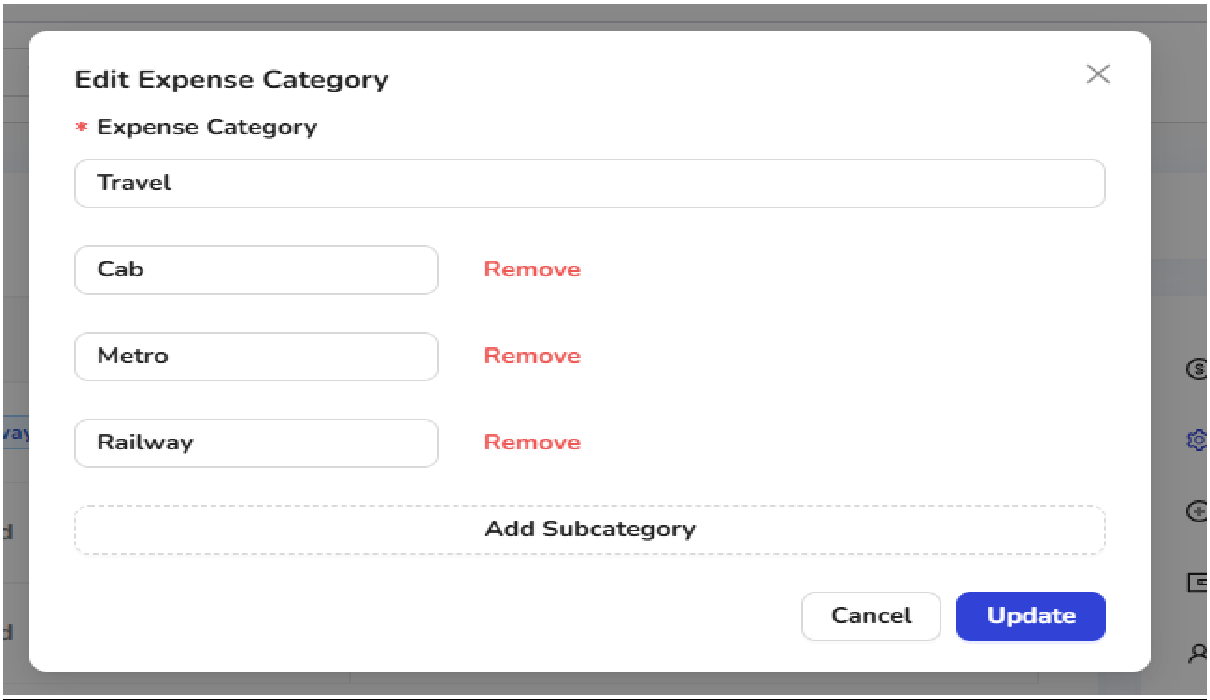

## c. Add Expenses

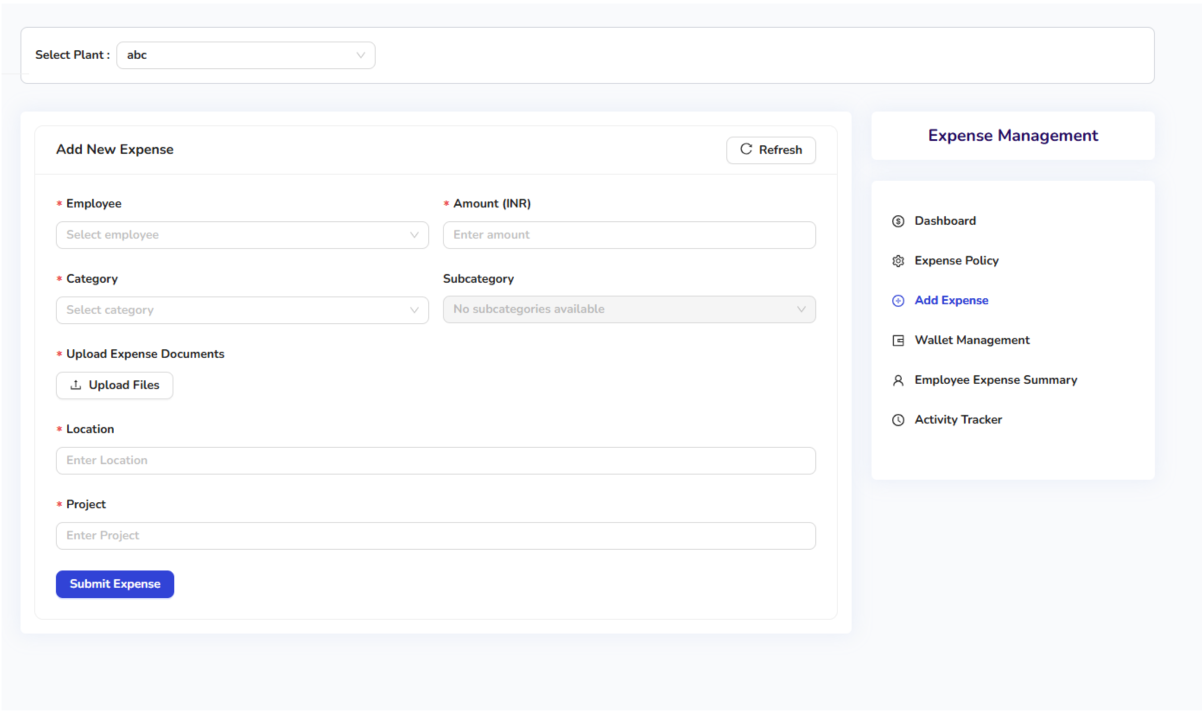
<u>Steps to apply or set the expense for employees:</u>

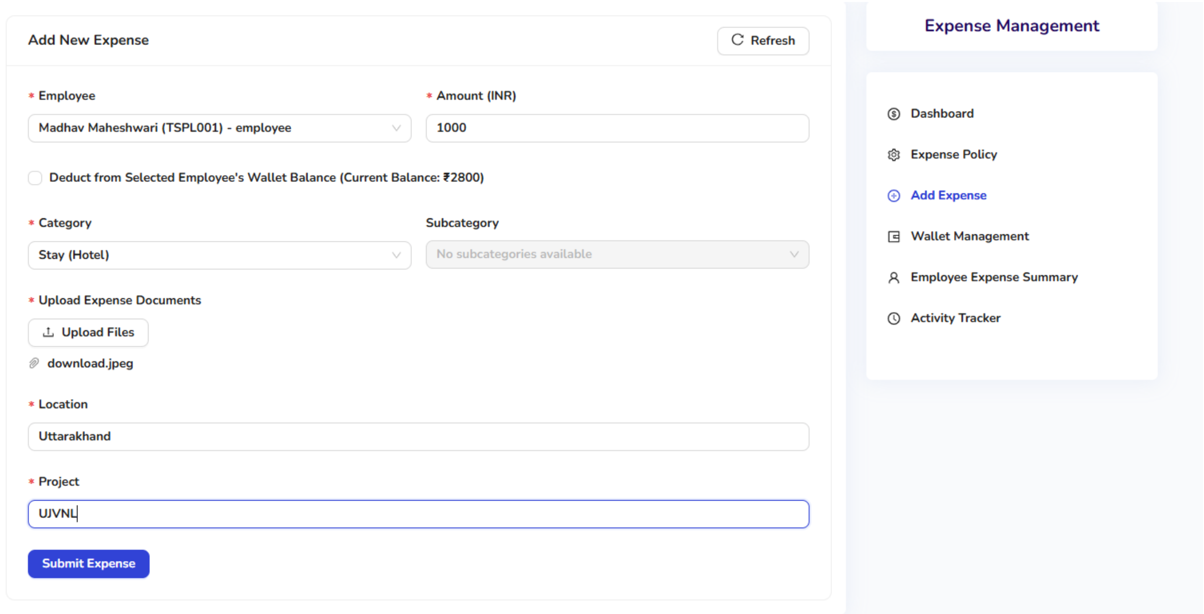
1. Click on Expense Policy
2. Select the Plant
3. Click on Custom Form Builder
4. Fill out all the details about the expense type (project details, expense type, amount limit, location, category, etc.)
5. Then submit the form




Owner can add subcategories:


Edit Expense Category
* Expense Category
Travel
Cab
Remove
Metro
Remove
Railway
Remove
Add Subcategory
Cancel
Update

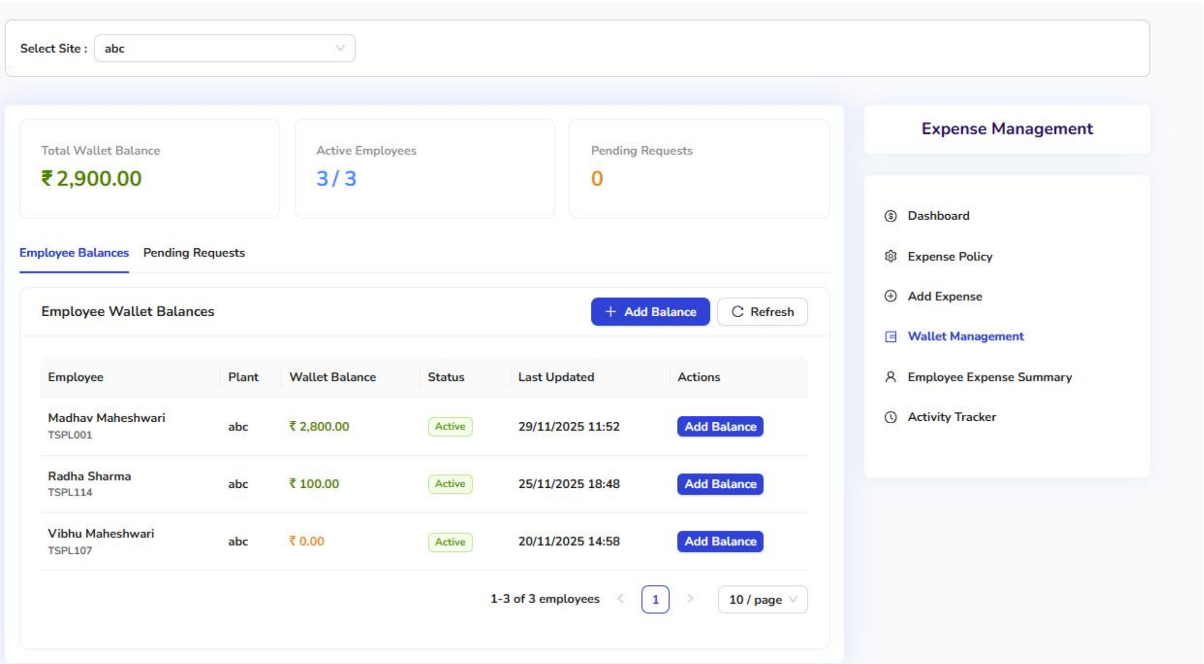

Select Plant :
abc
Add New Expense
Refresh
* Employee
Select employee
* Amount (INR)
Enter amount
* Category
Select category
Subcategory
No subcategories available
* Upload Expense Documents
Upload Files
* Location
Enter Location
* Project
Enter Project
Submit Expense
Expense Management
Dashboard
Expense Policy
Add Expense
Wallet Management
Employee Expense Summary
Activity Tracker



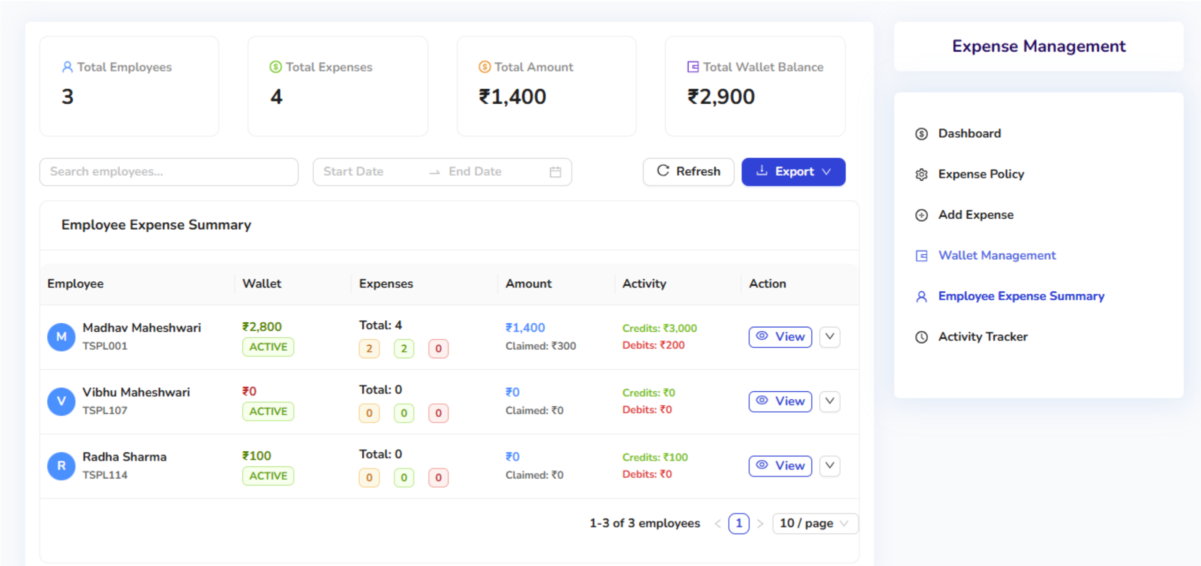

Fill out all the required details in the form, as shown in the picture. This includes selecting the employee, entering the amount, choosing the category, uploading the supporting documents, adding the location, and mentioning the project name.

### d. Wallet Management

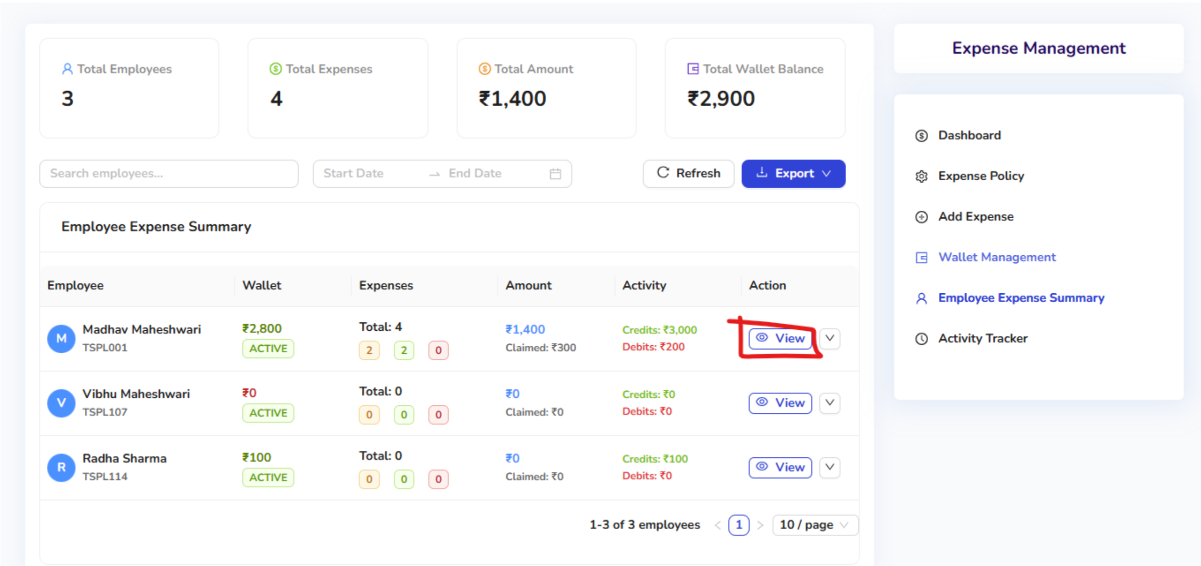
Wallet Management shows the remaining amount and pending requests by employees to the Admin/Owner.

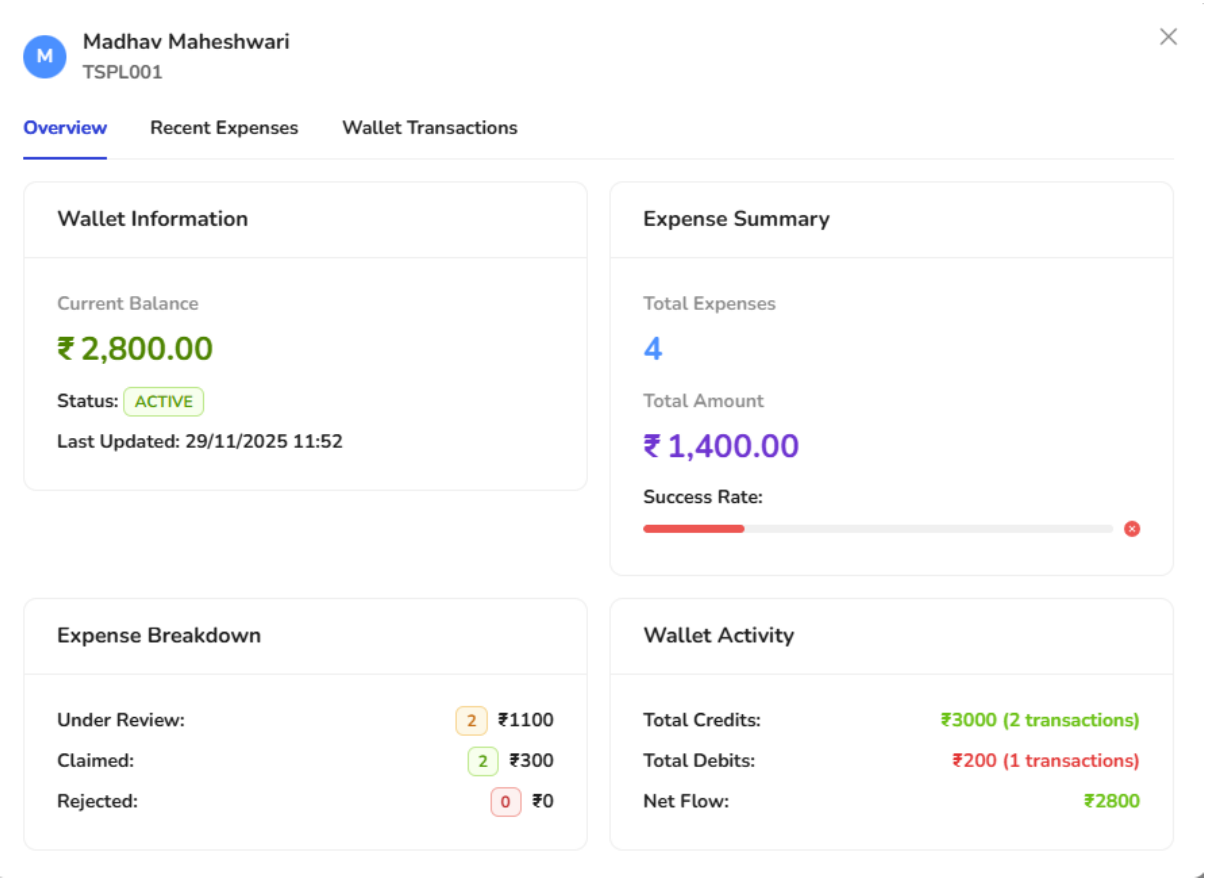


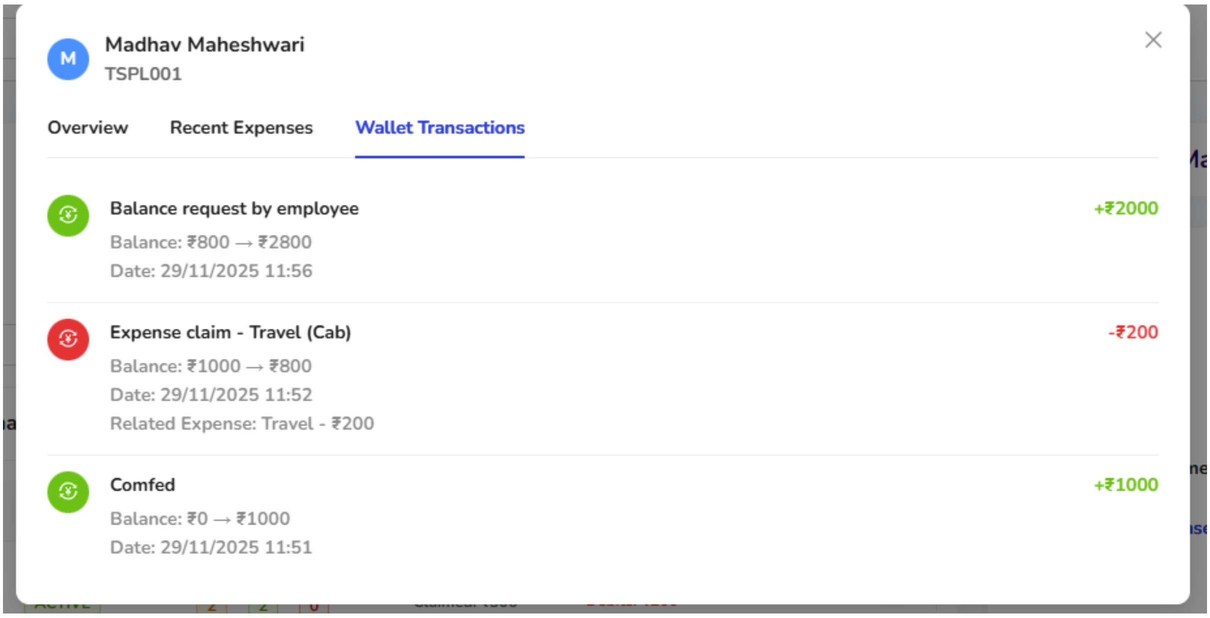
## e. Employee Expense Summary




Employees expenses will be displayed in this format, showing all key fields such as Employee Name, Wallet Balance, Total Expenses, Amount Claimed, Credits, Debits, Activity Summary and View Action.






If the employer has already added any wallet money or advance payment to an employee's account, then the approved expenses can be directly deducted from that available wallet balance.

# 10. <u>Leave Management</u>

Leaves are officially approved days off that employees can take from work with prior permission, as per company policy.

<u>Common types of leaves</u>

- Casual Leave (CL) – short-term personal needs
- Sick Leave (SL) – health-related reasons
- Earned or Privilege Leave (EL/PL) – accumulated leave taken later
- Maternity Leave / Paternity Leave
- Compensatory Off – for working on holidays or weekends
- Unpaid Leave (LWP) – when paid leave is exhausted

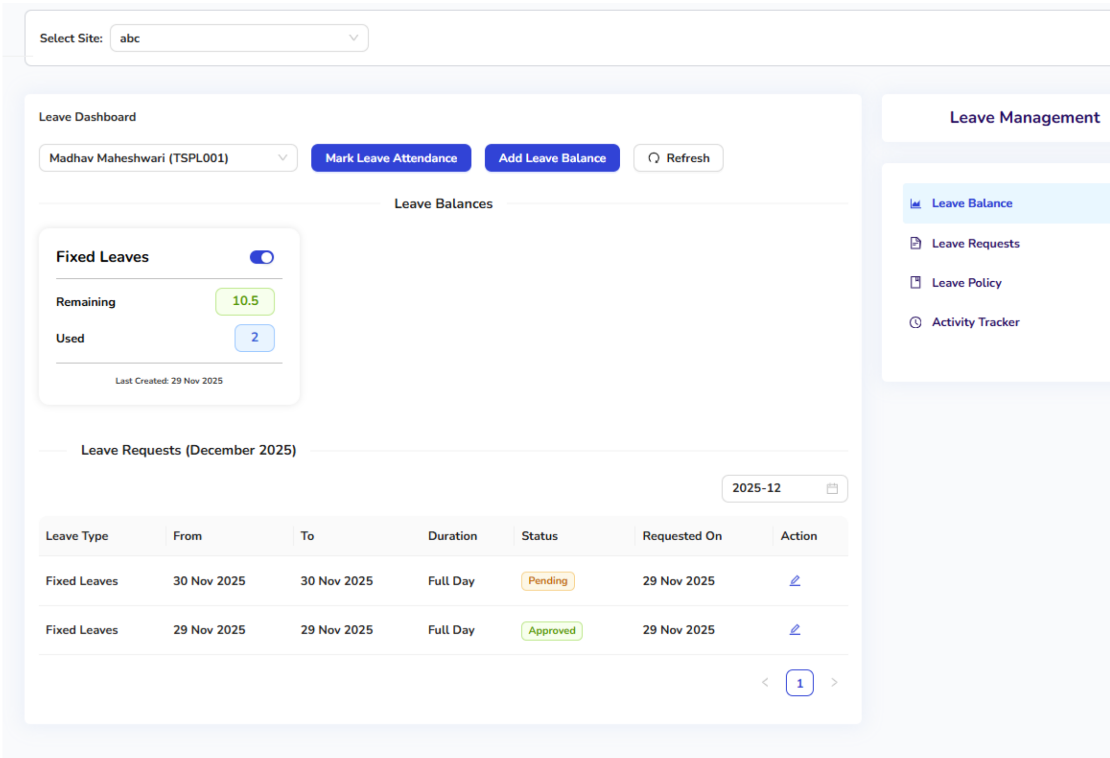
The Admin/Owner will first create the required leave policies based on the needs of different employees or sites. After setting up the policies, the owner can assign the appropriate employees to their respective leave policies.

**a. Leave Balance**

Leave balance is the number of leave days an employee still has available to use.

<u>How leave balance works?:</u>

- Leaves are credited as per company policy (monthly or yearly)
- Leaves taken are deducted from the total
- The remaining days are shown as the leave balance




*Example:*

If an employee gets 30 casual leaves in a year and uses 5, the leave balance is 25 days.

- Leave balance is auto-calculated
- Employees can view it anytime
- Managers/admin use it to approve or reject leave requests
- Prevents overuse of leaves

## b. Leave Requests

The Leave Requests section helps employers easily view, track and take action on all employee leave applications in one place.

Owner/Admin/Reporting manager can see quick stats like:

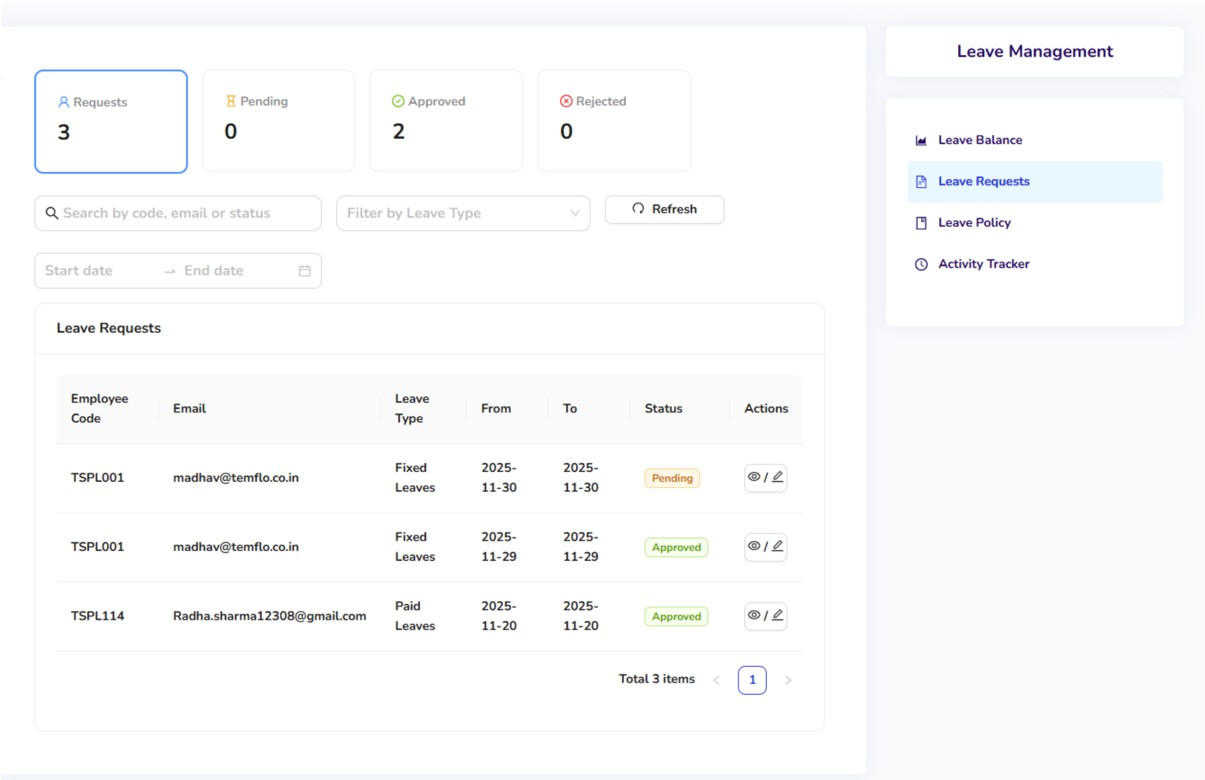
- Total Requests
- Pending
- Approved
- Rejected

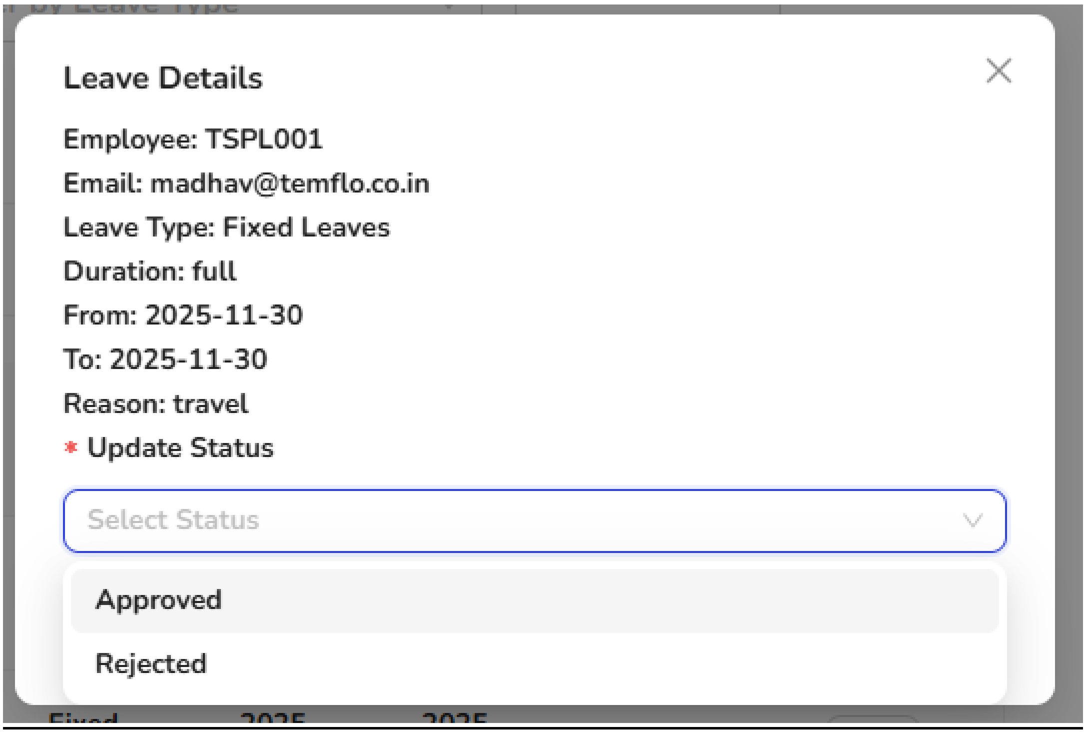
Below that, each leave request is listed with the following fields:

- Employee Code
- Email
- Leave Type (for example, Fixed Leaves or Paid Leaves)
- From Date
- To Date
- Status (Pending, Approved or Rejected)
- Actions (View, Approve or Reject)

The employer can click on any request to review the leave details, check the employee's leave balance and take the required action.

This section helps maintain transparency, ensures timely approvals and keeps all leave records properly organised for future reference.






**c. Leave Policy**

Leave Policy is a set of company rules that define how, when, and how much leave employees can take. It tells employees what kind of leaves they get and how to use them.

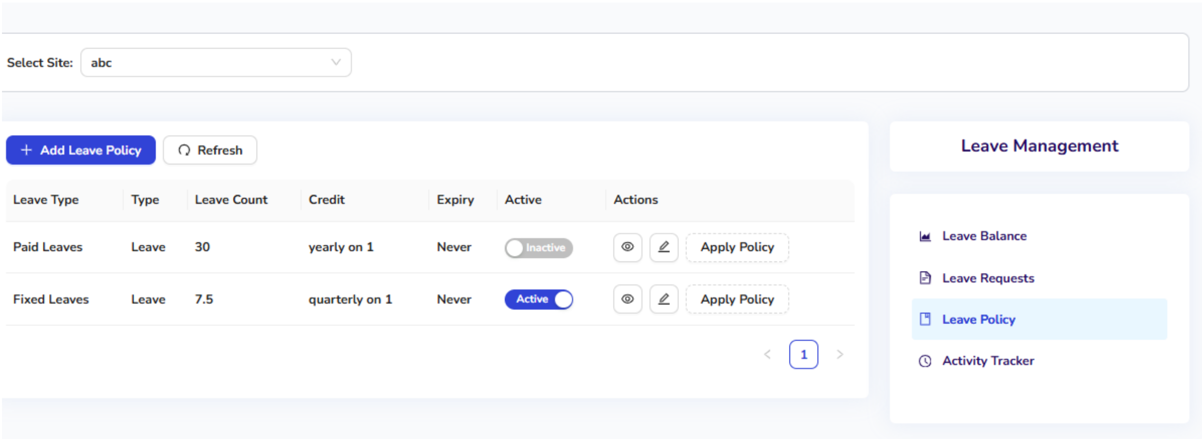
**What a leave policy usually includes**

- Types of leave (paid leave, sick leave, casual leave, fixed leave, etc.)
- Leave count (how many days are allowed)
- Credit cycle (yearly, quarterly, monthly)
- Eligibility (who can take which leave)
- Approval process (manager or HR approval)
- Expiry or carry forward rules
- Whether the policy is active or inactive

**In ERPICA:**

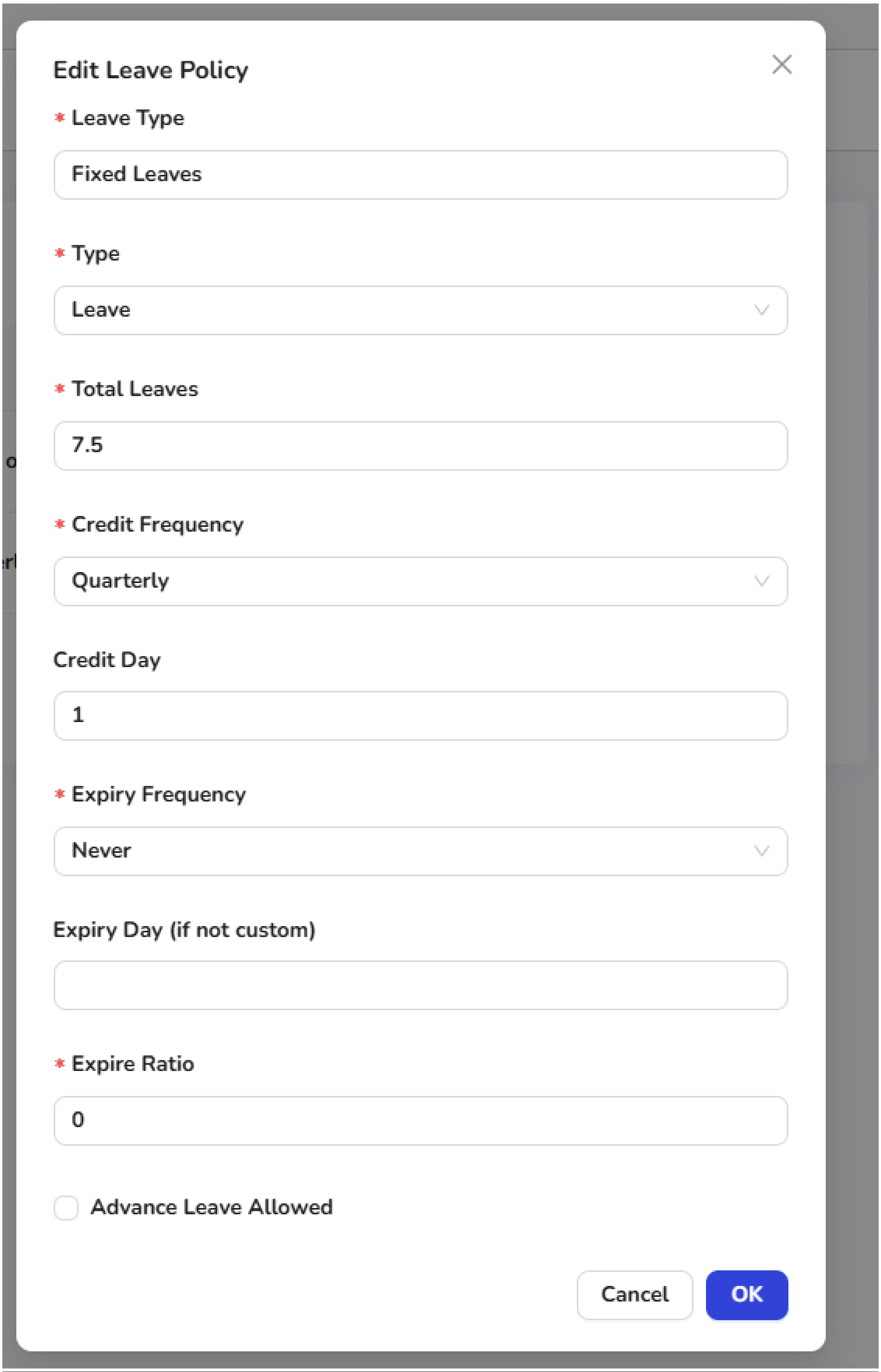
- Paid Leaves: 30 days, credited yearly, no expiry
- Fixed Leaves: 7.5 days, credited quarterly, active
- Admin can activate or deactivate policies

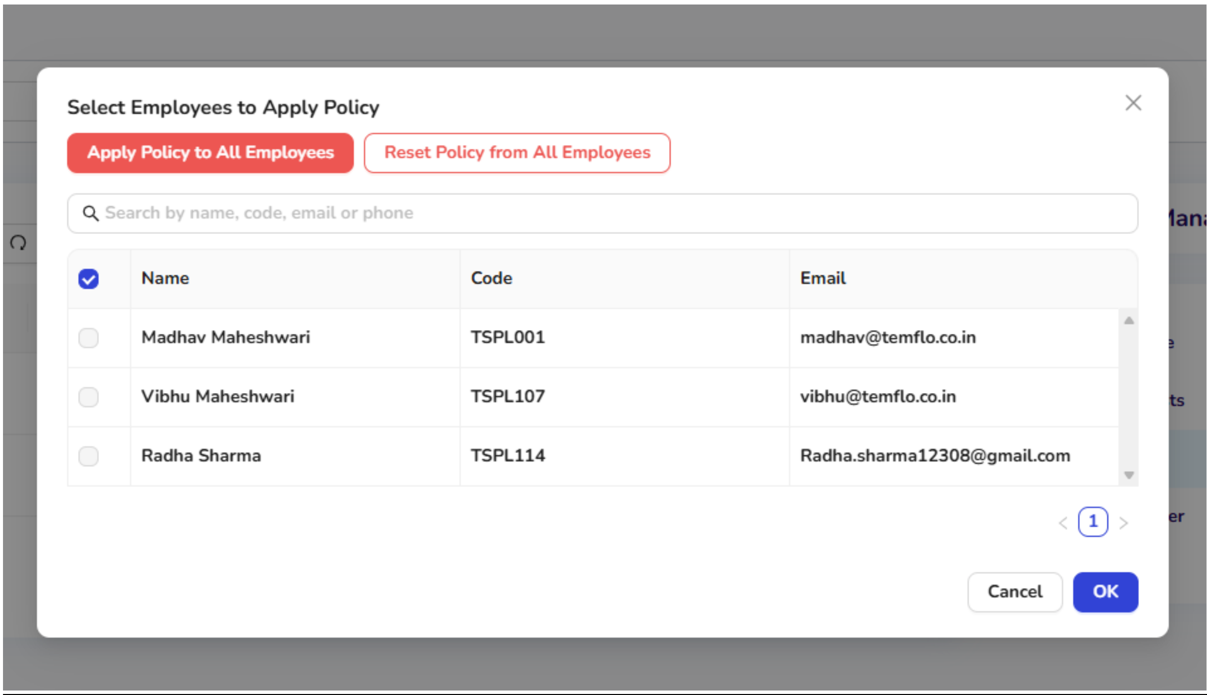
- Policies can be applied to specific sites or employees
- Leave policy automates leave calculation
- Ensures fairness and compliance
- Helps avoid confusion and manual errors



### Policy Details

| | |
|---|---|
| Name | Fixed Leaves |
| Type | leave |
| Count | 7.5 |
| Advance Allowed | No |
| Active | Yes |
| Credit Frequency | quarterly |
| Credit Day of Month | 1 |
| Custom Credit Dates | None |
| Expiry Frequency | never |
| Expiry Day of Month | |
| Custom Expiry Date | None |
| Expire Ratio | 0 |
| Created At | 2025-11-29 11:37 |
| Updated At | 2025-11-29 11:37 |


Edit Leave Policy
* Leave Type
Fixed Leaves
* Type
Leave
* Total Leaves
7.5
* Credit Frequency
Quarterly
Credit Day
1
* Expiry Frequency
Never
Expiry Day (if not custom)
* Expire Ratio
0
Advance Leave Allowed
Cancel
OK

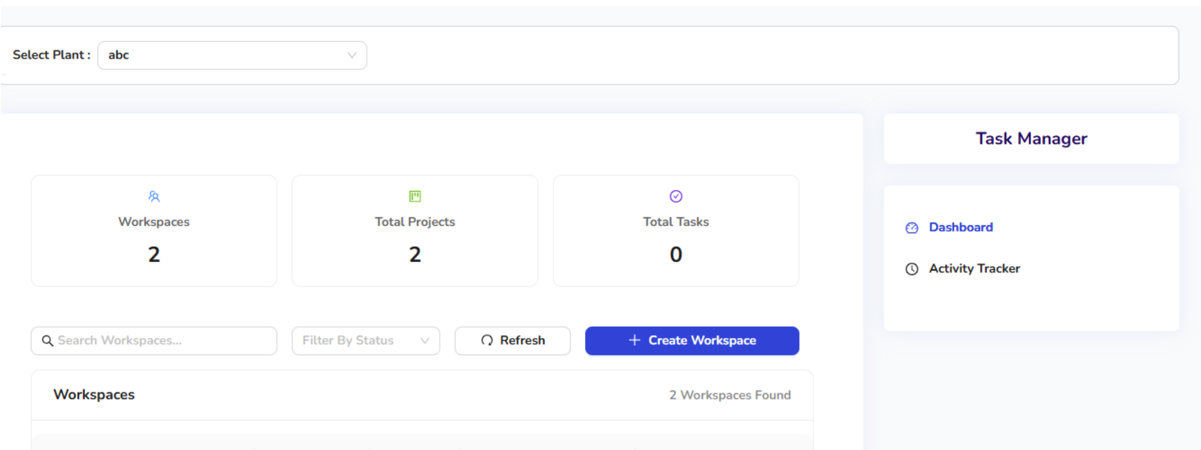



Owner/Admin can select and assign the applicable leave policy to individual employees based on their role, site, or employment type.

# 11. Task Manager

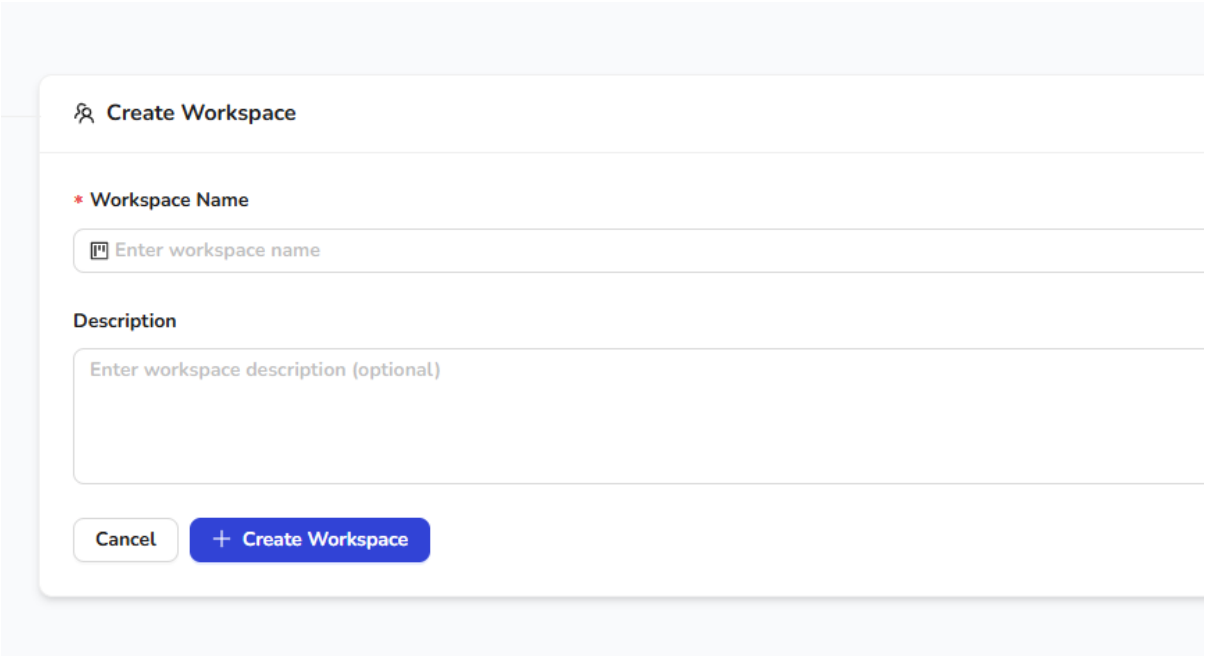
Task Manager is the place where you can add all important details related to any task. You can specify the task description, select the plant, choose the department, and add relevant tags. This helps keep everything organized and easy to track.

## a. Dashboard:



To create a workplace:

1. Click on Create Workspace
2. Enter the Workspace Name
3. Add a brief Description
4. Submit it



← Back To Dashboard

# Projects For Workspace: Accounts

Manage Projects And View Workspace Information

Create Project

| Total Projects | Active Projects | Inactive Projects | Total Tasks |
|---|---|---|---|
| 3 | 3 | 0 | 3 |

Search Projects...

Filter By Status

Refresh

## Projects (Accounts)

3 Projects Found

| Project Name | Description | Status | Members | Created | Actions |
|---|---|---|---|---|---|
| Advance Payment | Advance | Active | 2 | 12/1/2025 | |
| project 2 | jhjkhjk | Active | 0 | 11/29/2025 | |
| Bills Receivables | abc | Active | 0 | 11/29/2025 | |

1-3 Of 3 Projects < 1 > 10 / page

## Create New Project

Project Name

Enter a project name

Description

Write a brief description...

Members

Select team members

Tags

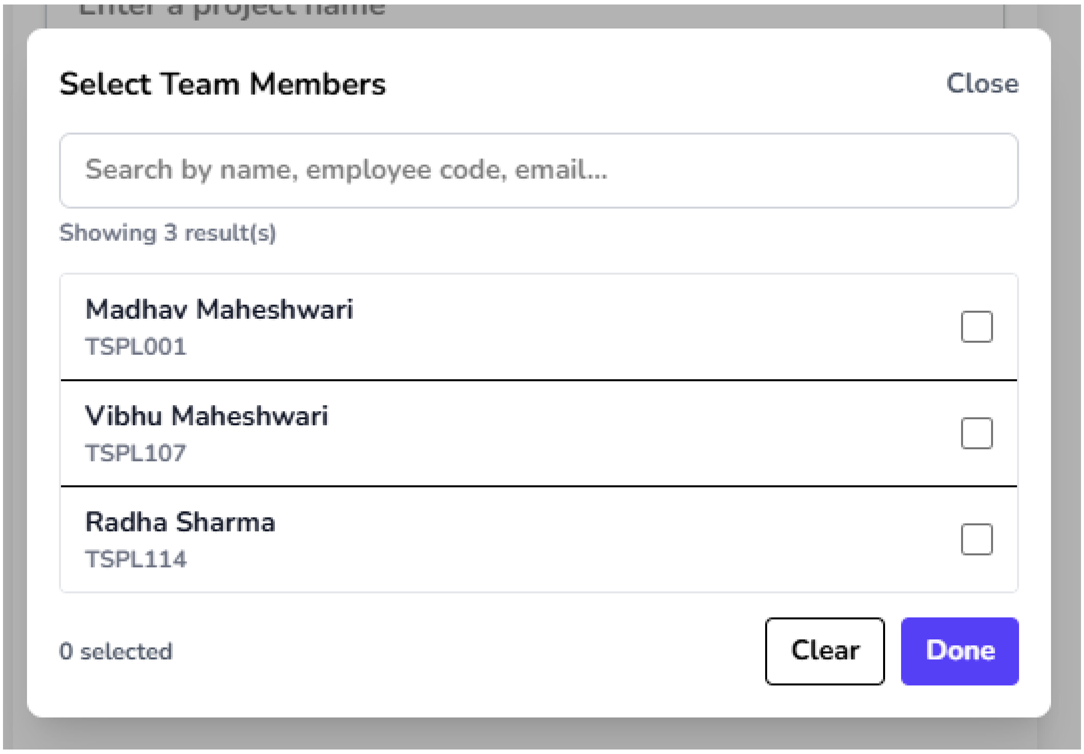
Press Enter to add tag

Links

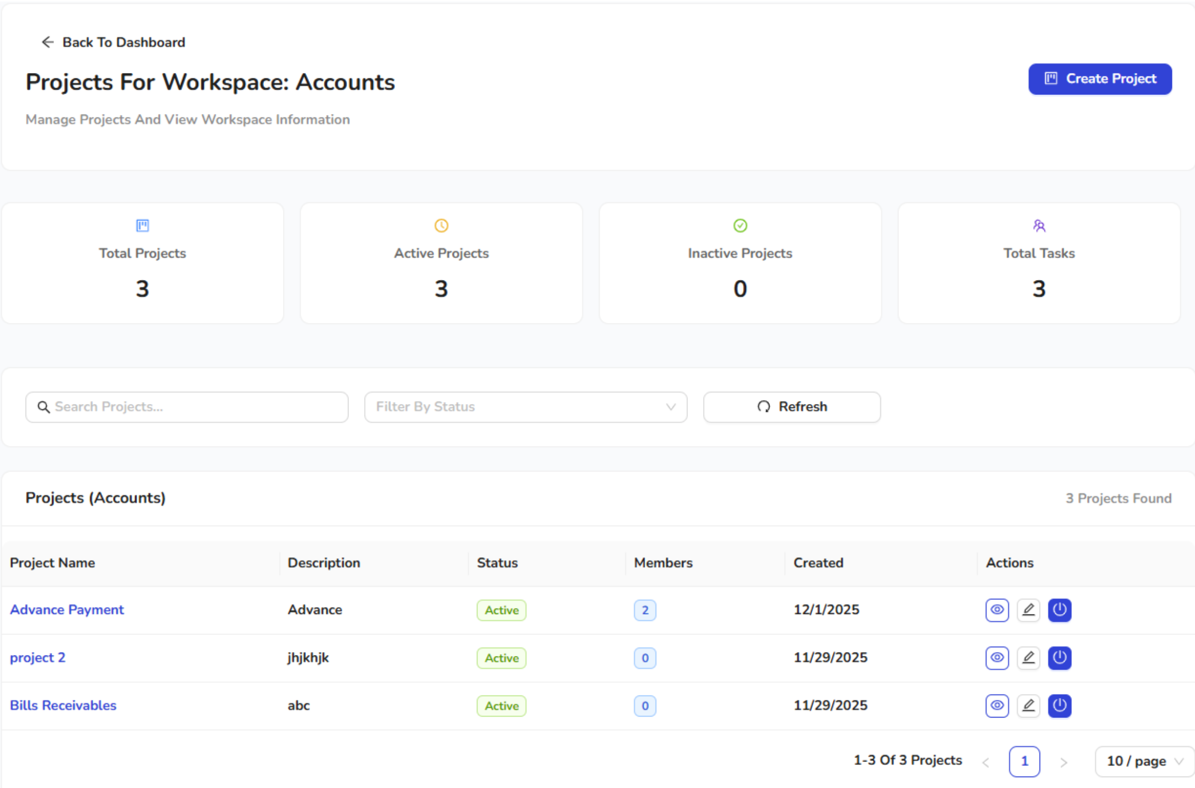
Paste link and press Enter

Cancel

Create Project




In Tags, multiple different tags can be added. In Links, you can add any relevant link.



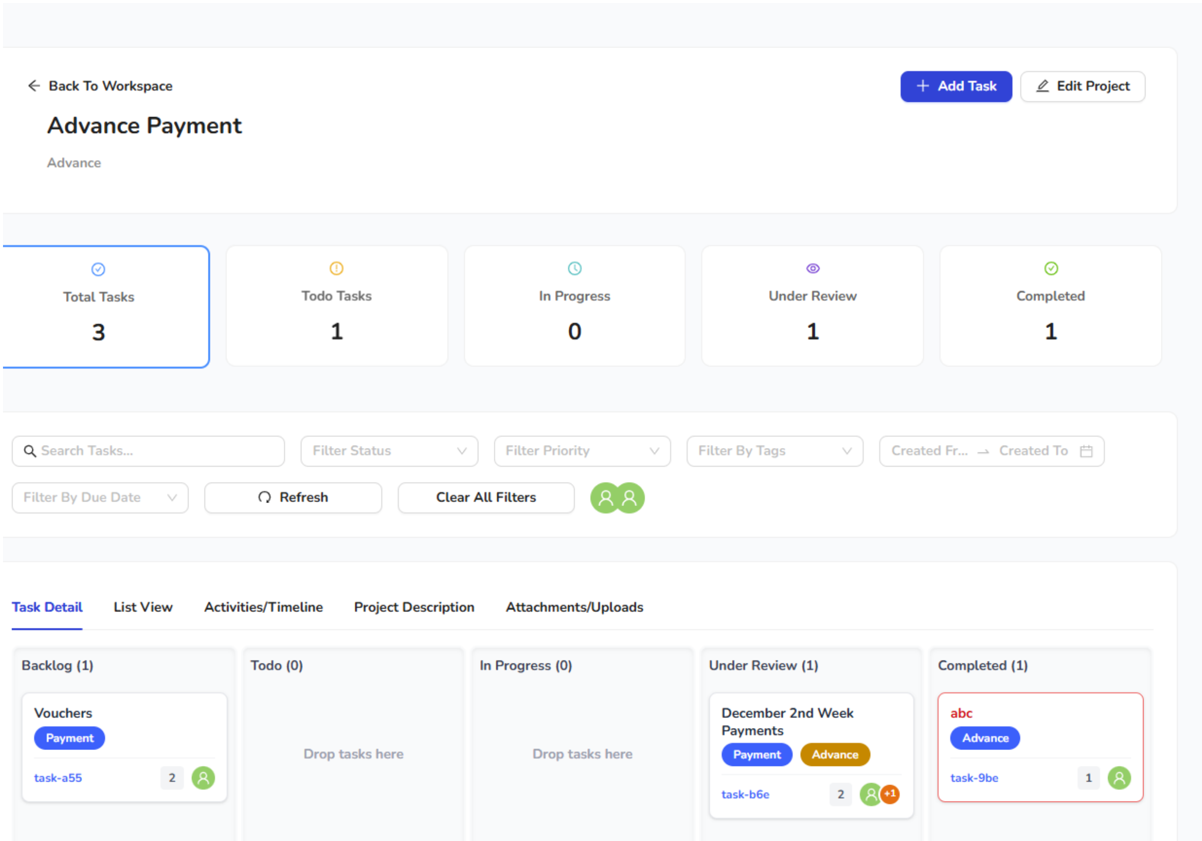
Accounts Workspace Projects

In the Accounts workspace, all ongoing and completed finance related projects are displayed in one place. This section helps you manage project details, track progress, and monitor team involvement easily.

Each project card shows the following fields:

- **Project Name** – The title of the project
- **Description** – Brief about what the project is for
- **Status** – Whether the project is Active or Inactive
- **Members** – Number of team members added to that project
- **Created** – The date on which the project was created
- **Actions** – Options to view, edit, manage members, or deactivate the project

This view allows the owner to quickly understand how many projects are running, how many are active, and how many tasks are linked with them. It keeps the entire Accounts department's workflow organized and easy to track



**Advance Payment (Accounts Workspace)**
The Advance Payment project helps the Accounts team manage all payment related tasks in an organized and trackable way. Inside this project, you can see a clear breakdown of every task and its current status.

From the top section, Owner can view:

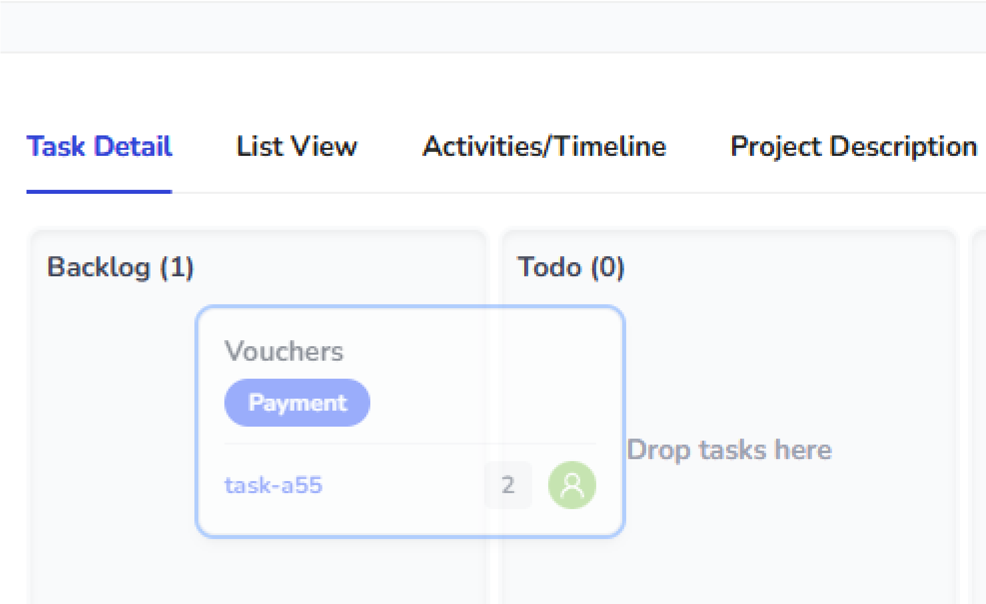
- Total Tasks
- Tasks in Todo
- Tasks In Progress
- Tasks Under Review
- Tasks Completed

Below that, the Task Detail board visually displays every task category such as:

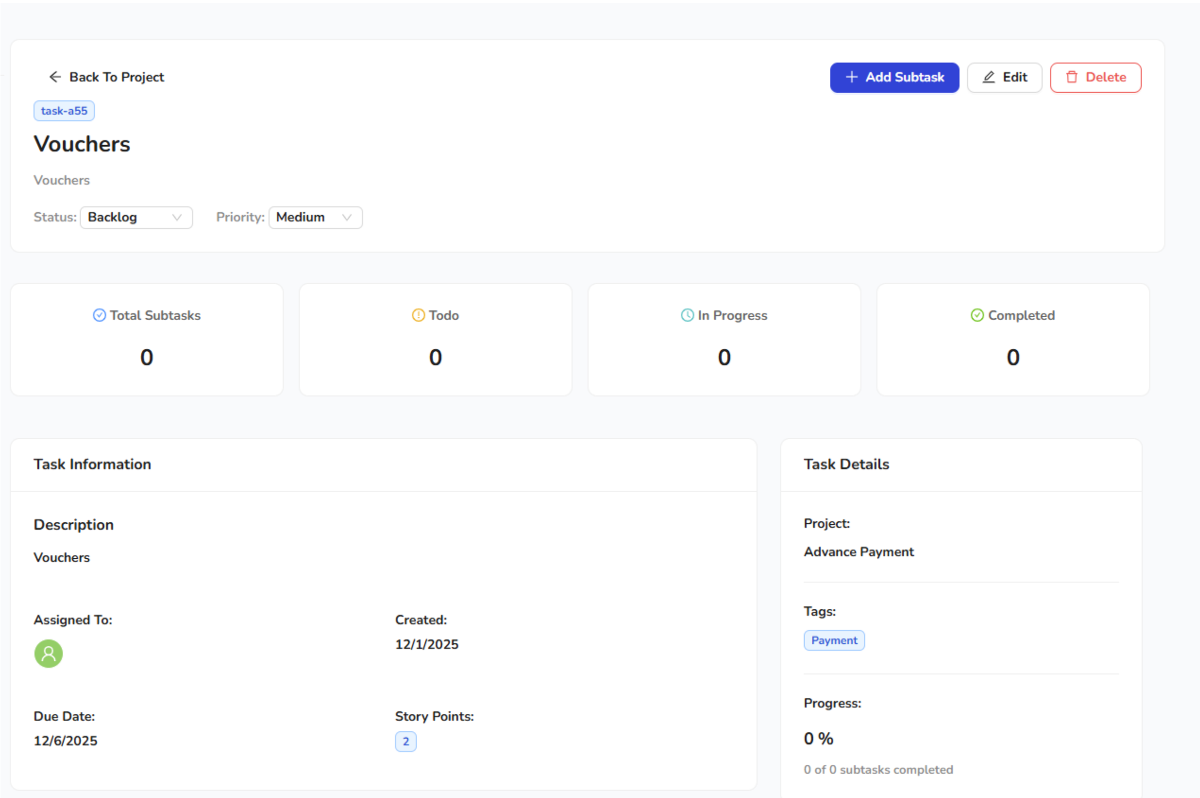
- Backlog
- Todo
- In Progress
- Under Review
- Completed

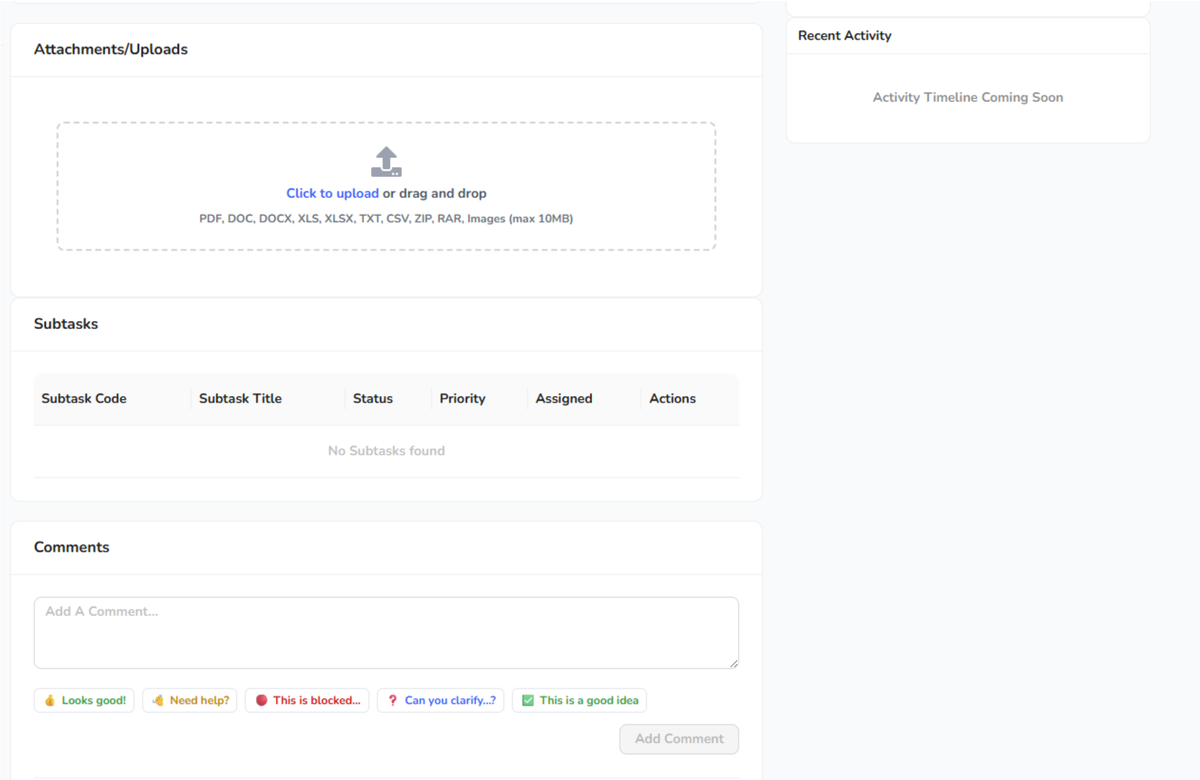
Each task card shows details like the task name, tags (for example Payment, Advance), and assigned members. This helps the team check which payments are pending, which are already reviewed, and which have been fully completed.

The section also includes filters for quick searching, sorting by priority, tags, due dates, and team members, making it easy to track and manage account-related payments efficiently.




You can drag and drop a task from the Backlog column to the To Do column.






This task gives a full snapshot of the **Sub task** within the Advance Payment project. It shows the task's current status, priority level, activity details, and progress.

You can instantly see how many subtasks are planned, what's pending, and what's been completed. Since everything is currently at zero, the task hasn't been started yet and is still sitting in the **Backlog** with a **Medium** priority.

The account also highlights key details like:

- **Description:** Vouchers
- **Assigned To:** Team member shown in the icon
- **Created On:** 1 December 2025
- **Due Date:** 6 December 2025
- **Story Points:** 2
- **Tag:** Payment
- **Project:** Advance Payment

This view basically helps you (or your team) track exactly where the task stands and what needs attention next. Super handy when you're juggling multiple tasks and want everything organized like a pro.

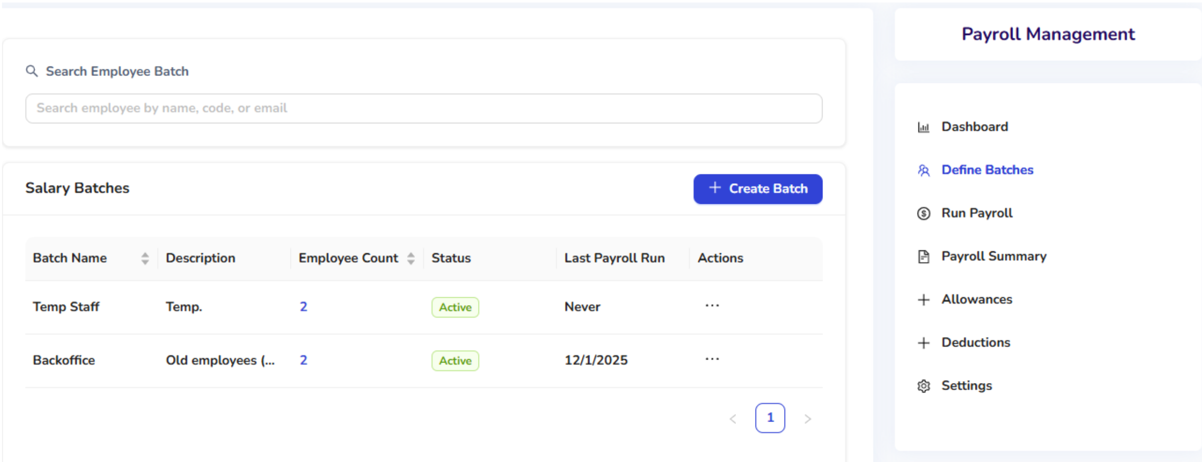
# 12. Payroll

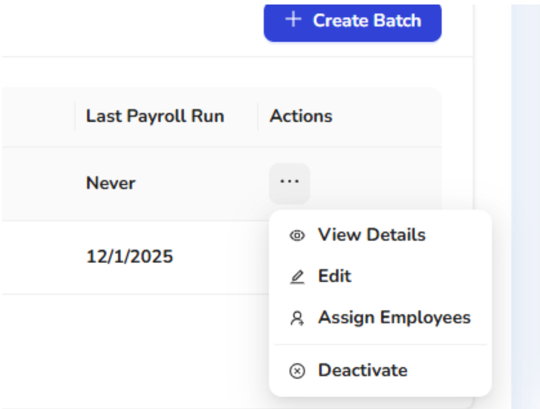
Payroll means calculating how much each employee should be paid, subtracting any deductions, and then releasing their salary on time. It also includes keeping records, generating payslips, handling taxes, and making sure all compliance rules are followed.

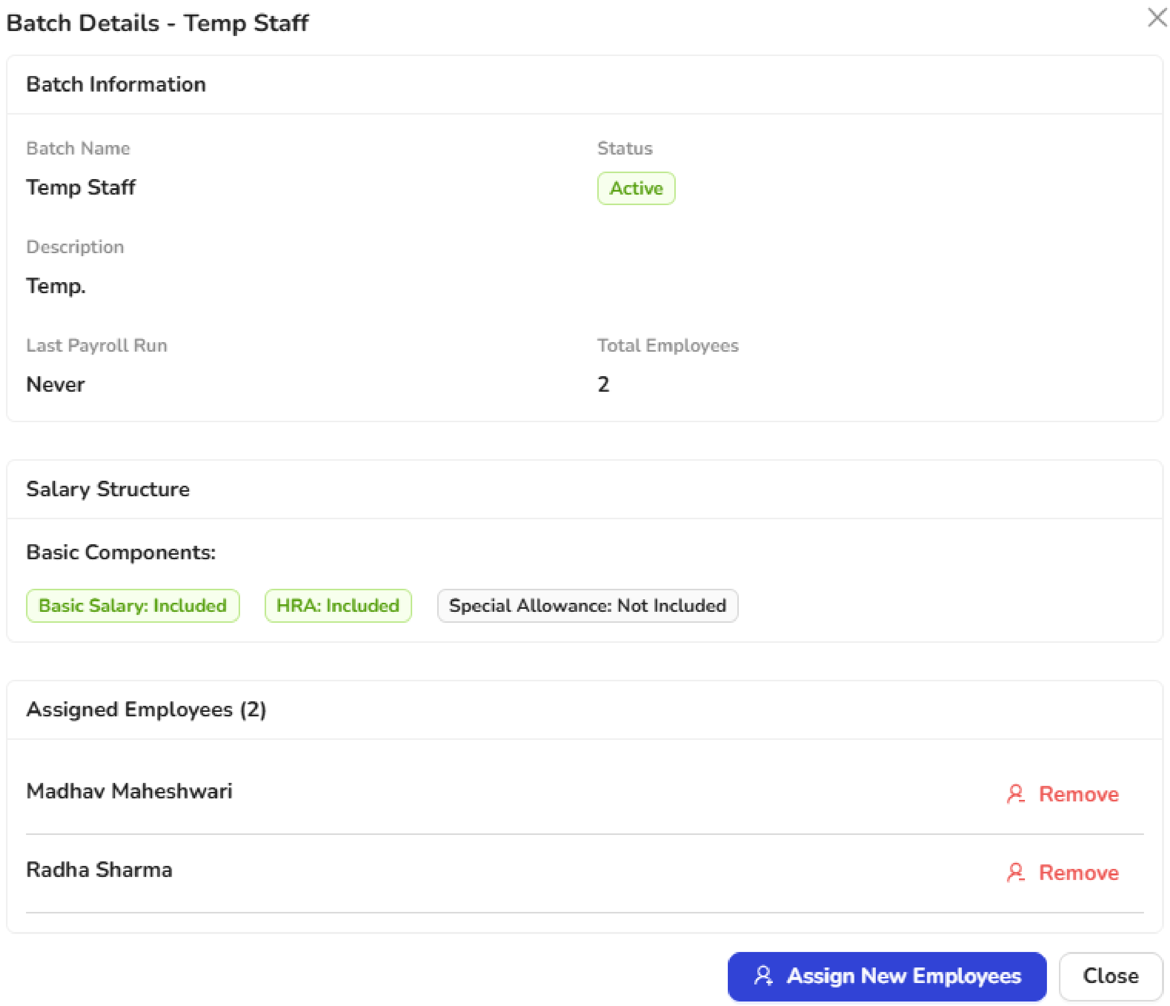
a. Dashboard

b. Define Batches

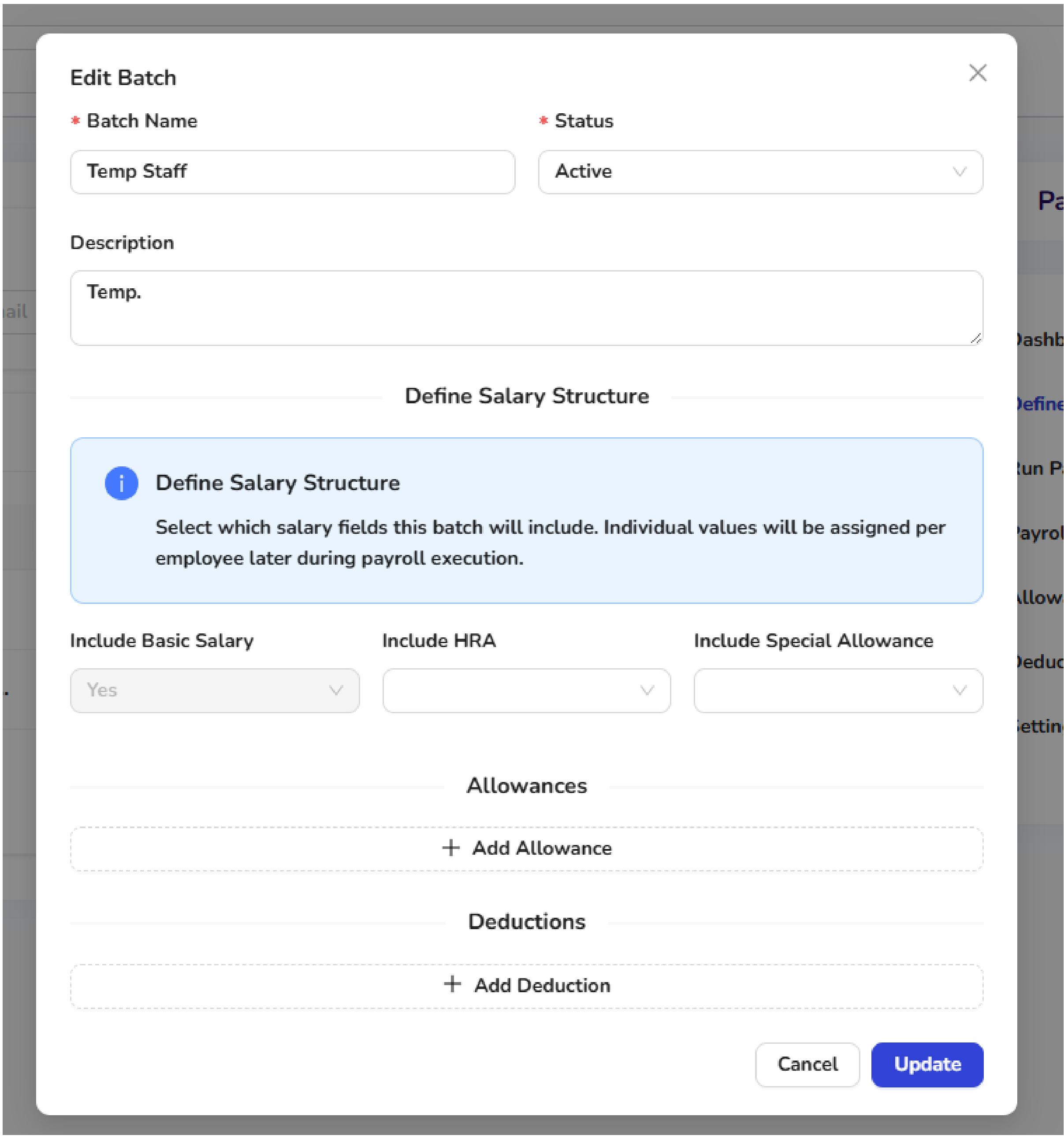
In batches, you can divide different types of payrolls based on employment types, for example, contract employees, trainees, new employees, and existing employees.



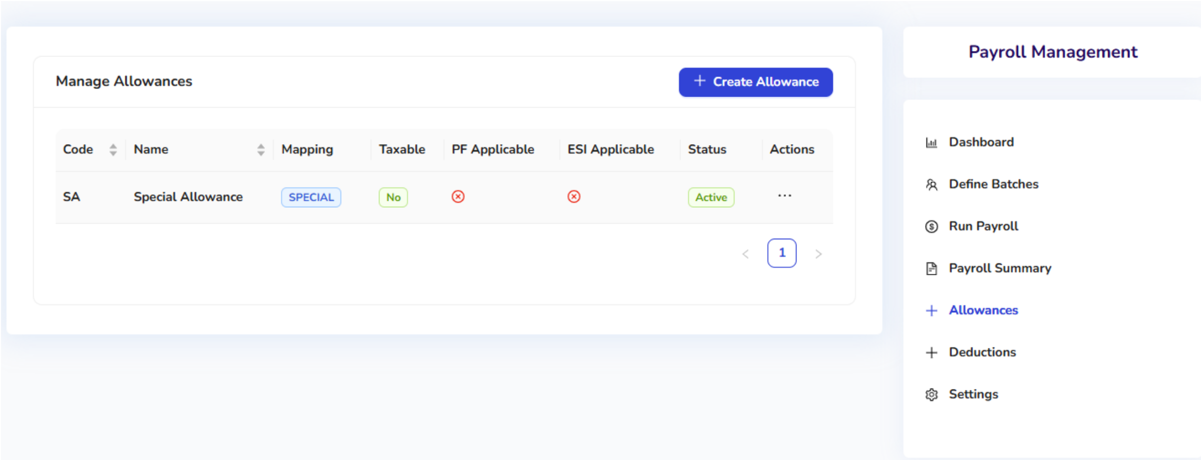



You can assign, add, or remove any employee as needed from this section.



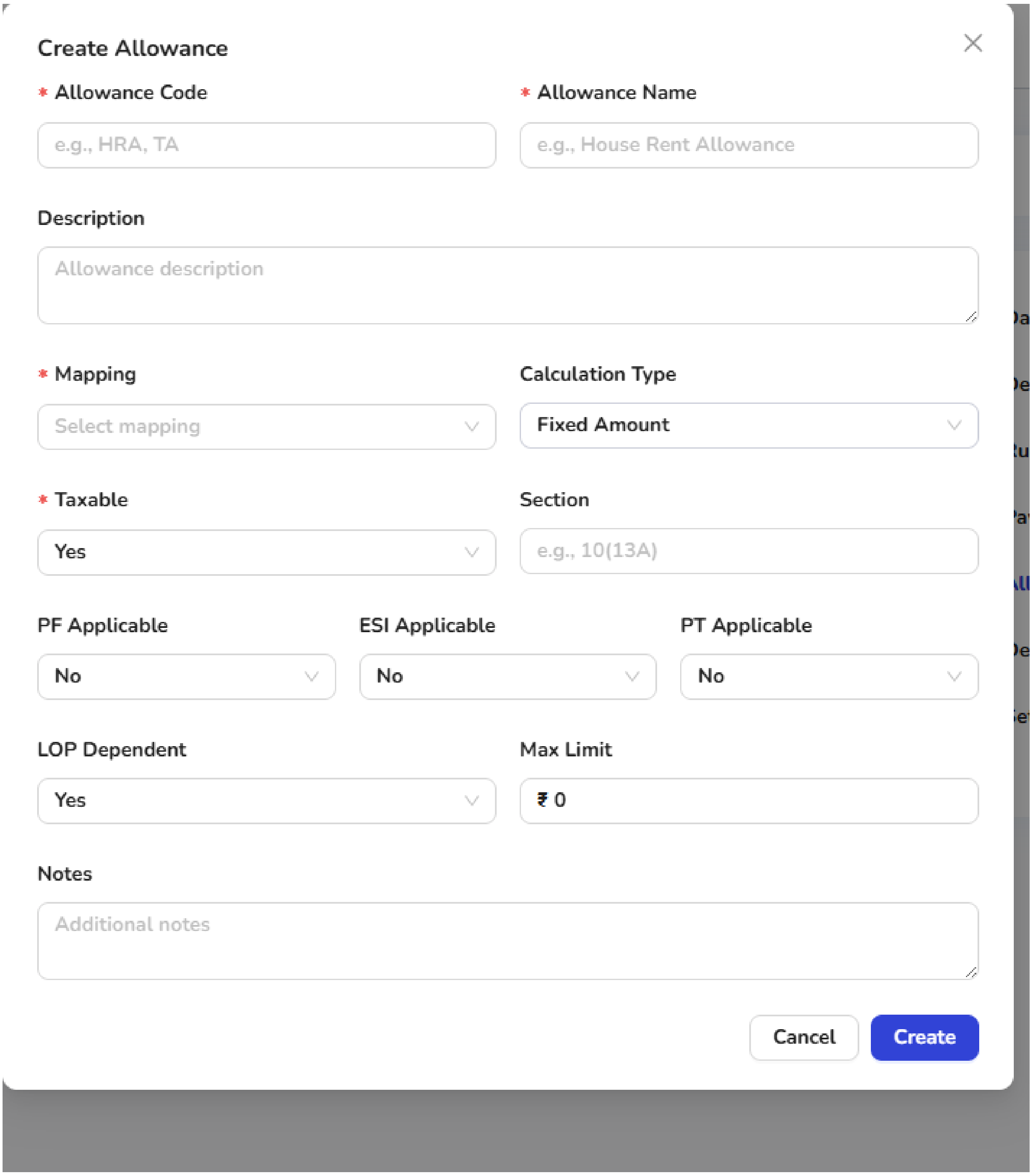

c. **Run Payroll**
d. **Payroll Summary**
e. **Allowances**




This section lets you create and control different types of allowances that are added to an employee's salary. You can set the allowance code, name, and mapping so the system knows exactly where it belongs in payroll calculations.

You also get quick toggles to decide if the allowance is taxable, PF applicable, or ESI applicable. The status column shows whether an allowance is currently active, and the actions menu helps you edit or update it whenever needed.

The Create Allowance button at the top helps you add new allowances in a few clicks, keeping things neat and fully customizable.




This screen lets you set up a new allowance that will be added to employee salary structures. You can define everything from the allowance name to how it’s calculated and whether it affects PF, ESI, or PT.

Here’s what each part means:

i. **Allowance Code**
A short code that identifies the allowance. Example: HRA, TA, SA.

ii. **Allowance Name**
The full name of the allowance like House Rent Allowance or Special Allowance.

iii. **Description**
Optional notes about what this allowance is for.

iv. **Mapping**
Select the internal mapping used for payroll calculations. This helps the system classify the allowance correctly.

v. **Calculation Type**
Choose how the allowance will be calculated such as Fixed Amount or Percentage.

vi. **Taxable**
Decide if this allowance should be included in taxable income.

vii. **Section**
If the allowance falls under a specific tax section, you can enter it here.

viii. **PF / ESI / PT Applicable**
Turn these on if the allowance should be considered while calculating PF, ESI, or Professional Tax.

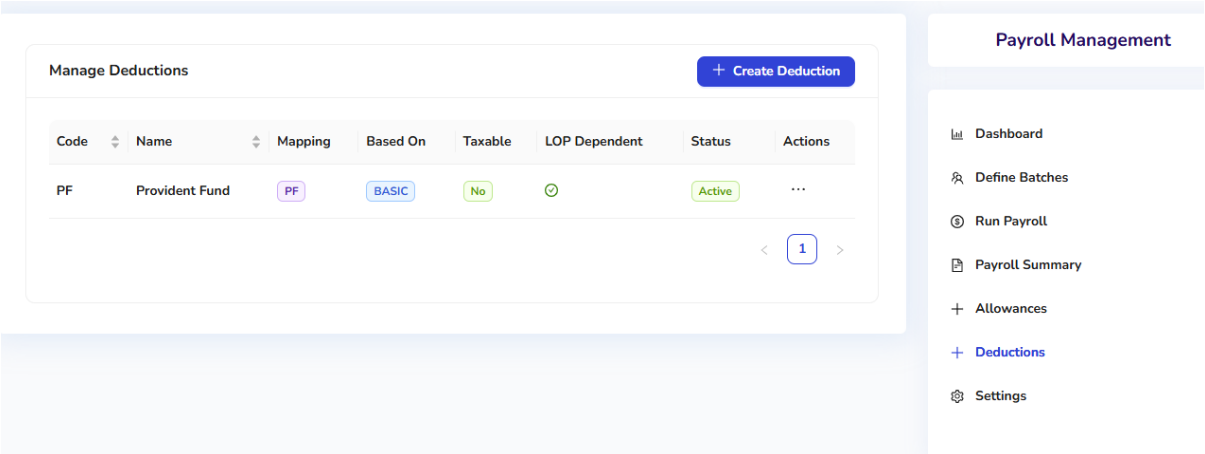
ix. **LOP Dependent**
Choose whether this allowance should be reduced when an employee has loss of pay.

x. **Max Limit**
Set a maximum allowable amount if needed.

xi. **Notes**
Any additional internal notes for reference.

Once all fields are set, hit **Create** to save the new allowance.

**f. Deductions**




Deductions are amounts subtracted from an employee's salary as part of the payroll process. These may include statutory contributions such as Provident Fund, company-specific deductions, or adjustments based on attendance and leave. The *Deductions* section in the payroll system allows administrators to easily view, configure, and manage all such salary deductions in one place.

### Purpose of the Deductions Module

The module helps payroll teams:

- Define and manage different types of salary deductions
- Set rules for how each deduction is calculated
- Determine whether a deduction is taxable or non-taxable
- Specify if the deduction should vary based on Loss of Pay
- Activate or deactivate deductions based on organizational needs
- Maintain accuracy and compliance across payroll cycles

### Key Elements Shown in the Interface

I. Deduction Details: Each deduction entry displays important information such as:

- Name of the deduction (e.g., Provident Fund)
- Mapping to the relevant payroll component
- Calculation basis (for example, based on Basic salary)

- Taxability, indicating whether the deduction affects taxable income
- LOP Dependency, showing if the deduction changes when salary is reduced due to unpaid leave
- Status, showing whether the deduction is currently active

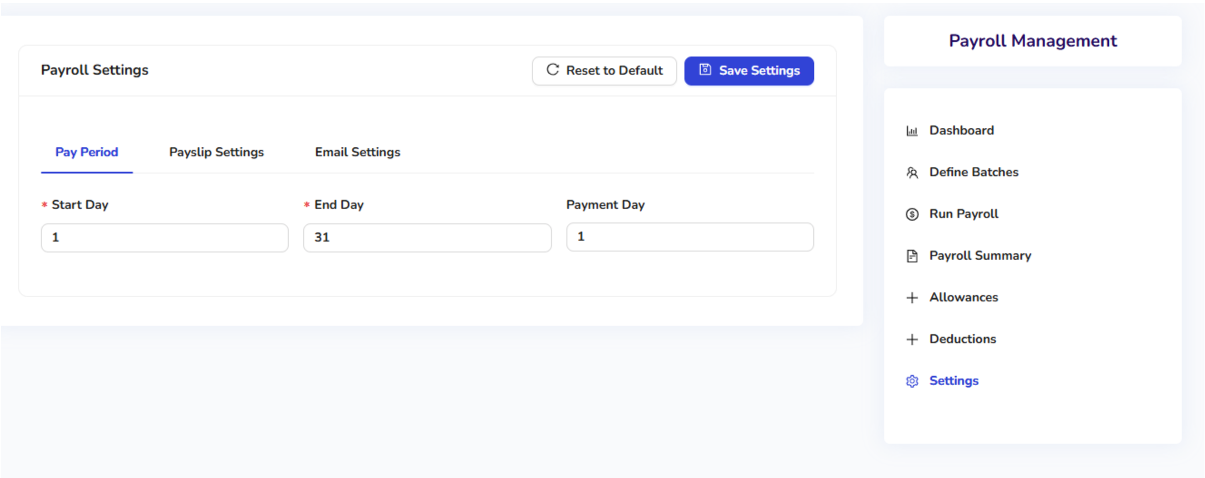
Ii. Create Deduction

A dedicated button allows administrators to add new deduction types and configure their rules.

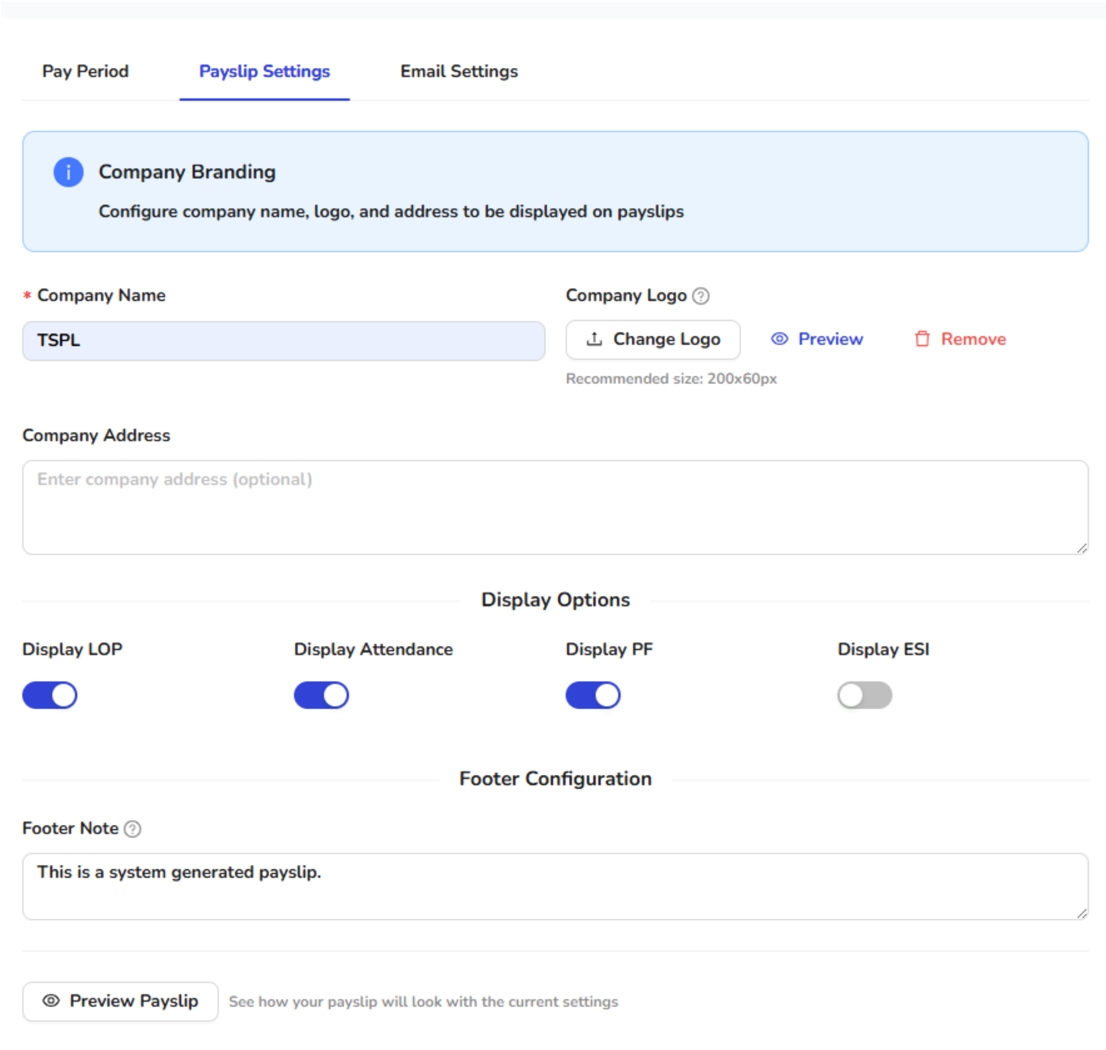
Iii. Easy Navigation

Pagination at the bottom helps users move through multiple deduction records with ease.

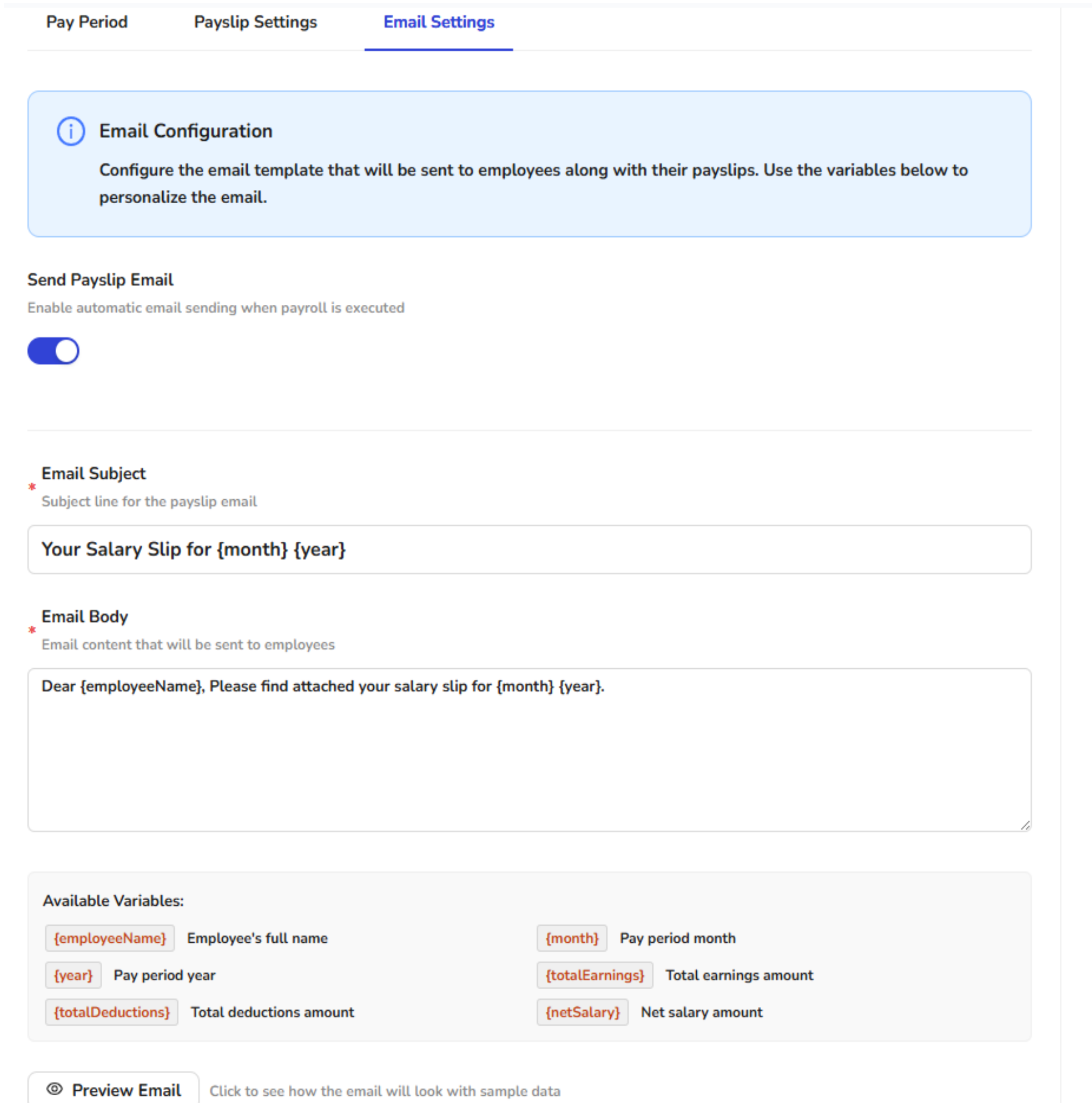
## g. Settings




The Payroll Settings section lets you define the start and end of the pay period along with the exact day employees get paid. This helps automate salary processing and keeps every cycle smooth and predictable.




The Payslip Settings section lets you customize how your company's payslips look and what information they display. You can set the company name, upload a logo, and add an address so your payslips look polished and legit. You also get full control over what details show up, like LOP, attendance, PF, or ESI.




The Email Settings section lets you customize the emails that go out to employees along with their payslips. This is basically where you set the vibe for your payroll communication.

Here is what you can do in this section:

i. **Send Payslip Email Toggle**
You can turn on automatic email sending when payroll is processed. Once enabled, the system will send payslips directly to employees without needing manual action.

ii. **Email Subject**
You can set the subject line for your payslip email. For example:

*Your Salary Slip for {month} {year}*
The curly bracket values update automatically based on the pay cycle.

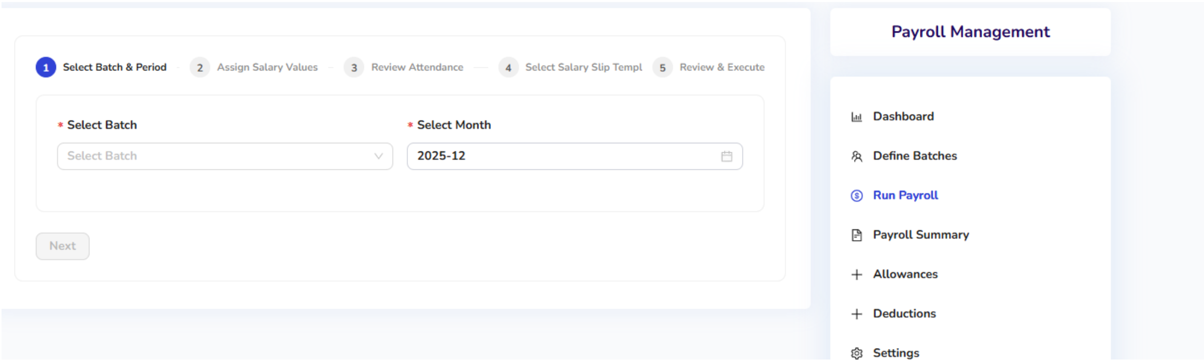
iii. **Email Body**
This is the main message that employees will receive with their payslip. You can add a custom message and use dynamic variables like employee name, month, year, net salary, and more. The system replaces these variables with real data when emails are sent.

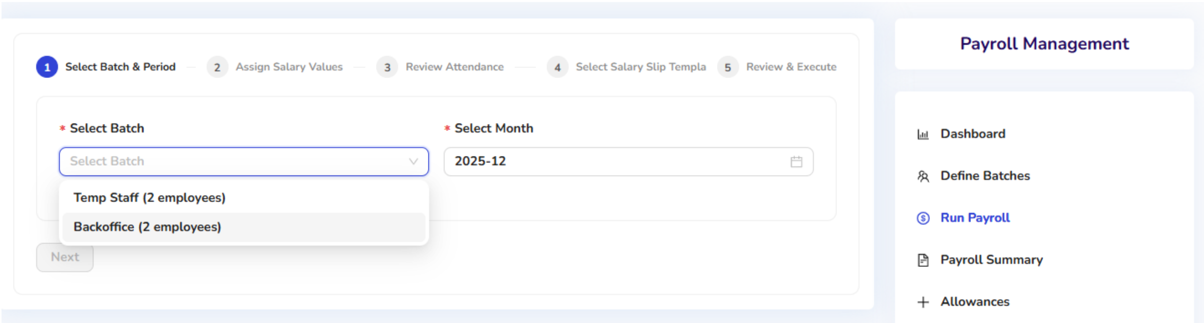
iv. **Available Variables**
A handy list of placeholders you can insert in the subject or message. Examples:

- {employeeName} – Employee’s name
- {month} – Salary month
- {year} – Salary year
- {totalEarnings} – Total amount earned
- {totalDeductions} – Total deductions
- {netSalary} – Final salary amount

v. **Preview Email**
Before sending it to everyone, you can preview how the email will look with sample data.

# Run Payroll


Payroll Management
1 Select Batch & Period
2 Assign Salary Values
3 Review Attendance
4 Select Salary Slip Templ
5 Review & Execute
* Select Batch
Select Batch
* Select Month
2025-12
Next
Dashboard
Define Batches
Run Payroll
Payroll Summary
Allowances
Deductions
Settings


Payroll Management
1 Select Batch & Period
2 Assign Salary Values
3 Review Attendance
4 Select Salary Slip Templa
5 Review & Execute
* Select Batch
Select Batch
* Select Month
2025-12
Temp Staff (2 employees)
Backoffice (2 employees)
Next
Dashboard
Define Batches
Run Payroll
Payroll Summary
Allowances