

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?

The screenshot shows a 'Sign Up' form for creating a company account. The form fields include:

- Email:** abc@officialmail.com
- Password:** (Redacted)
- Company Code:** A1B2
- Company Name:** ABC Pvt. Limited
- Country:** IN India
- State:** Select state
- City:** Select state first
- PinCode:** e.g. 560001
Pin Code is required
- Address:** Complete address
- PhoneNumber:** 0123456789
- Company Currency:** IN INR

At the bottom, there is a link 'Already Have An Account? [Log In](#)' and a large blue 'Sign Up' button.

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.

Verify your email | ERPICA



ERPICA <noreply@erpica.in>

To hr

Reply

Reply All

Forward

...

Thu 11/20/2025 1:07 PM

(i) If there are problems with how this message is displayed, click here to view it in a web browser.

Welcome to ERPICA

Your Enterprise Resource Planning Solution

Hello

Thank you for creating your ERPICA account. To complete your registration and secure your account, please verify your email address by clicking the button below.

Congratulations! Your account comes with a **45-day Free Trial** that includes complete access to all ERPICA modules and features. No credit card required!

[Verify Email Address](#)

Having trouble with the button?

Copy and paste this link in your browser:

<https://erpica.in/verify/691ec51d684cb8b503b0c062/FaSrYe-8GDNsVsbPu23yS>

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.

Sign In

* Email

* Password



Remember Me

[Forgot Password](#)

Don't Have An Account? [Sign Up](#)

[Log In](#)

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.

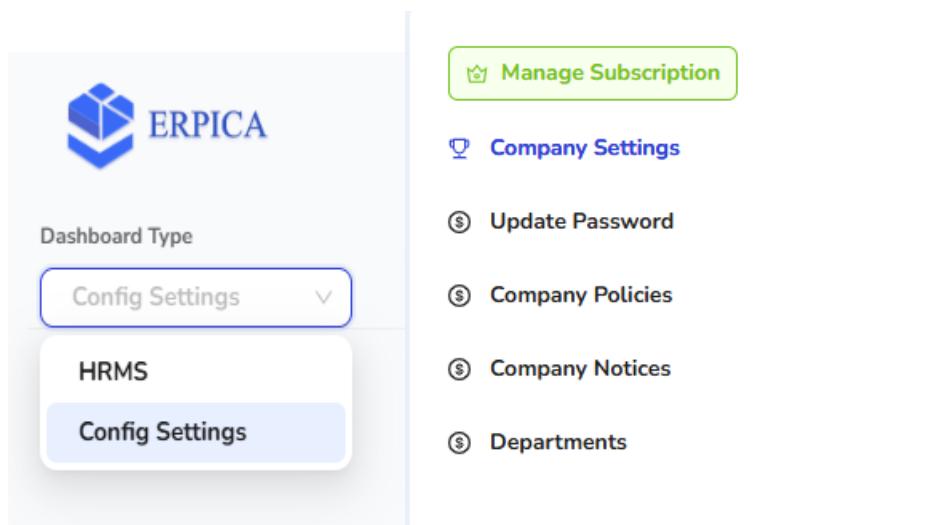
Admin

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.

The screenshot shows the 'Manage Subscription' page with the following details:

Current Subscription:

- Plan Type: free
- Status: active
- Next Billing: 1/4/2026

Upgrade Plans:

- Employee and Plants Module (Fixed)**: ₹35 /employee + ₹200/plant
 - ✓ Register employees and plants
 - ✓ Store and manage complete employee information
 - ✓ Transfer employees seamlessly between multiple plants
 - ✓ Assign and manage role-based access for each plant
 - ✓ Control module-wise access for individual users
- Attendance Management**: ₹25 /employee
 - ✓ Track daily attendance and working hours
 - ✓ Set attendance rules and shifts per employee

Choose number of Employees & Plants:

- Employees: 10 (sliders)
- Plants: 1 (sliders)
- Buttons: Monthly, Yearly

Total Cost: ₹550 / month

a. Company Setting

The screenshot shows the 'General Details' section of the Company Settings page. It includes fields for Company Code (TSPL), Company Name (ABC Pvt. Limited), Company Address (empty), Company Country (IN India), Company State (Uttar Pradesh), Company City (Ghaziabad), Company Pin Code (201010), Company Email (hr@temflo.co.in), Company Phone (0123456789), Company Legal Status (Select legal status), Company Currency (IN INR), Accounting Year (empty), Company PAN (empty), and Company TAN (empty). A 'Save' button and a refresh icon are at the top right. A sidebar on the right lists 'Settings' options: Manage Subscription, Company Settings (highlighted in green), Update Password, Company Policies, Company Notices, and Departments.

General Details

Company Code: TSPL
Company Name: ABC Pvt. Limited

Company Address:

Company Country: IN India
Company State: Uttar Pradesh
Company City: Ghaziabad
Company Pin Code: 201010

Company Email: hr@temflo.co.in
Company Phone: 0123456789

Company Legal Status: Select legal status
Company Currency: IN INR

Accounting Year:

Company PAN: Company TAN:

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

b. Update Password

The screenshot shows the 'Update Password' form. It has three input fields: 'Old Password' (marked with a red asterisk), 'New Password' (marked with a red asterisk), and 'Confirm Password' (marked with a red asterisk). Below the fields is a blue 'Update Password' button.

* Old Password

* New Password

* Confirm Password

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

The screenshot shows a user interface for managing company policies. On the left, there's a form with fields for 'Policy Description' (a large text area), 'Published Date' (a date picker), and 'Upload Policy Document' (a button labeled 'Click to Upload'). A blue '+ Add Policy' button is located to the right of the upload field. Below the form is a table titled 'Added Policies' showing three entries:

Description	Published Date	Uploaded At	File	Action
HR Policy	11/22/2025	11/22/2025, 5:19:15 PM	View File	Delete
Code of conduct	11/22/2025	11/22/2025, 5:19:34 PM	View File	Delete
Travelling Allowance	11/22/2025	11/22/2025, 5:20:07 PM	View File	Delete

On the far right, a sidebar titled 'Settings' contains links: 'Manage Subscription', 'Company Settings', 'Update Password', **Company Policies** (which is bolded), 'Company Notices', and 'Departments'. There are also navigation arrows < (1) > below the table.

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

- o 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

The screenshot shows the 'Company Notices' section of a mobile application. At the top right is a 'Settings' button. Below it is a list of navigation items: 'Manage Subscription' (green), 'Company Settings' (grey), 'Update Password' (grey), 'Company Policies' (grey), 'Company Notices' (blue, indicating the current section), and 'Departments' (grey). The main area has three input fields: 'Notice Description' (with a large text input box), 'Published Date' (with a date picker), and 'Upload Notice File' (with a 'Click to Upload' button and a '+ Add Notice' button). Below these is a table titled 'Added Notices' showing one entry: 'REVISED TERMS AND CONDITIONS' uploaded on '11/22/2025' at '11:22:48 PM'. It includes 'View File' and 'Delete' buttons. Navigation arrows are at the bottom.

Description	Published Date	Uploaded At	File	Action
REVISED TERMS AND CONDITIONS	11/22/2025	11/22/2025, 5:22:48 PM	View File	Delete

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.

Department Code	Description	...
ACC01	Accounts	...
HR01	Human Resource	...

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

4. Business Locations

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.

Plant

ADD NEW PLANT

* PlantCode

* Name

* Address

* City

* State

* Postal Code

* Country

* Email

* Phone

Check created Business Locations

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

Activity Tracker

Plant List (2)

PlantCode	Name	City	State	Phone	Email	...
1001	abc	City of abc Project/Plant	UP	0123456789	xyz@officialmail.com	...
1002	XYZ	City of XYZ Project/Plant	Uttarakhand	0123456789	xyz@officialmail.com	...

< 1 >

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.

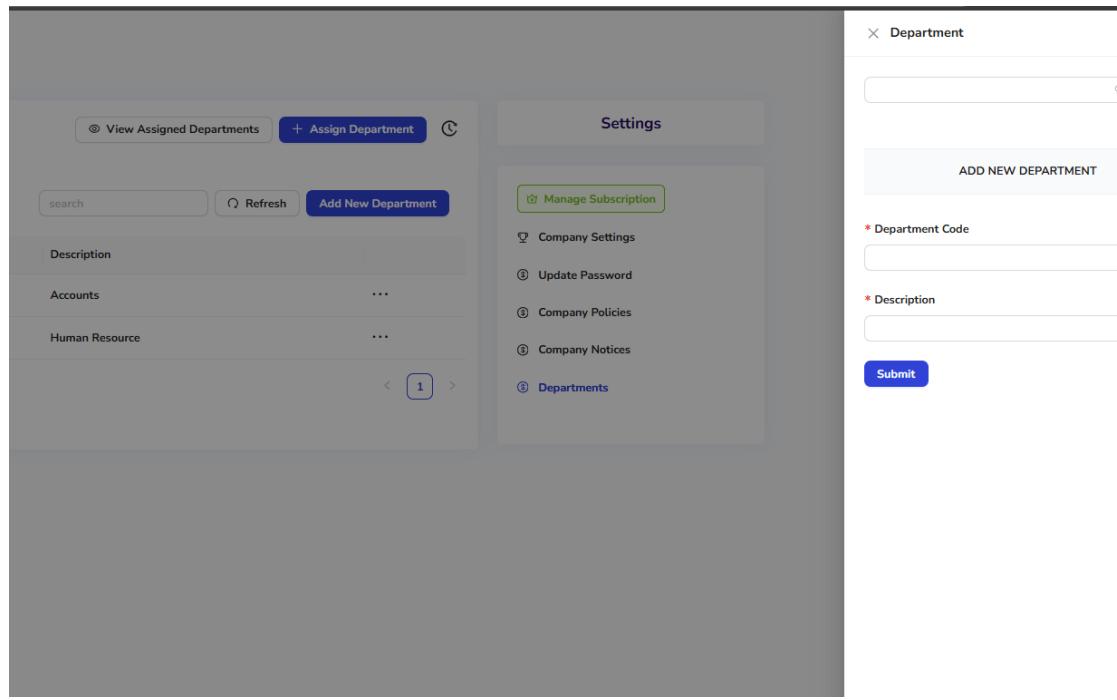
Examples of common departments:

- 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:



X Department

<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="New"/>
----------------------	---------------------------------------	------------------------------------

SE01

 Edit  Remove

Department Code : SE01
Description : Service
Assigned Plants : Not Assigned

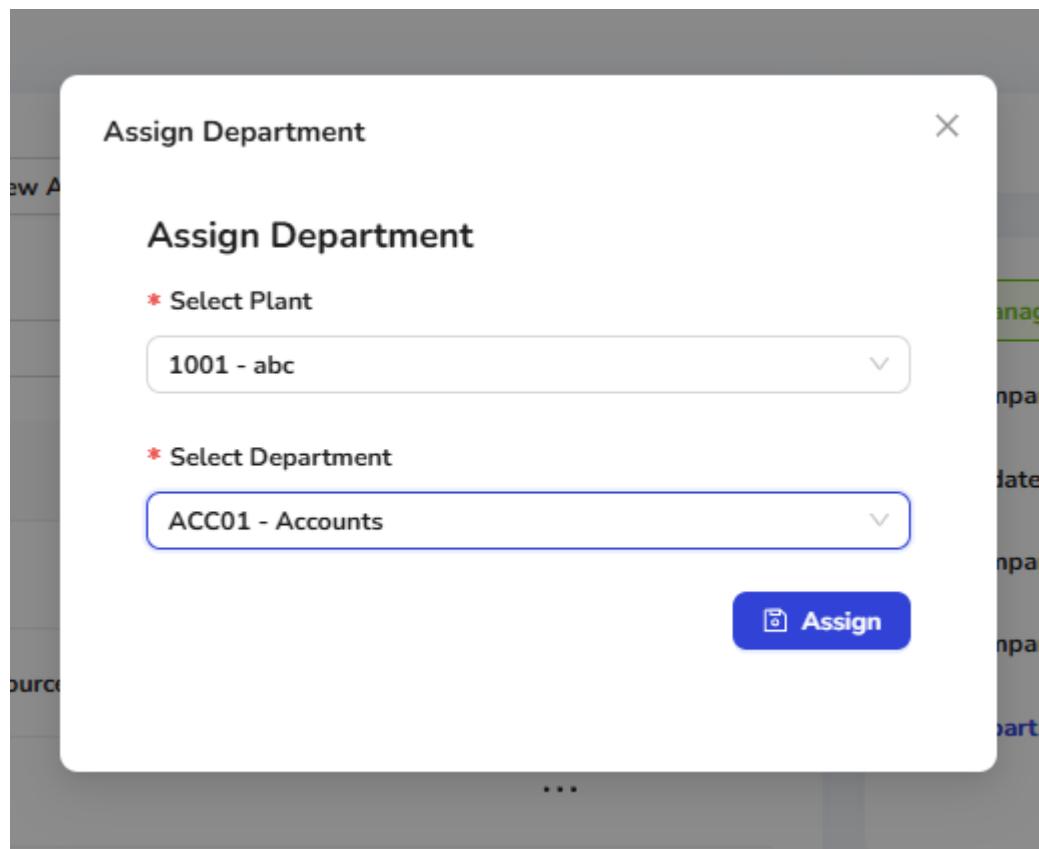
ADD NEW DEPARTMENT

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 screenshot of the ERPICA HRMS dashboard. On the left is a sidebar with navigation links: Dashboard, Employee (which is selected and highlighted in blue), Plants, Attendance, Leave, Asset, Expenses, and Task Manager. The main content area has several sections: "Upload Bulk Employee" with an "Upload Excel" button and a file input field; "Download / Export Employee Details" with "Download Template" and "Export All Employees" buttons; a search/filter bar for "Search by name/email/code", "Filter by Plant", and "Filter by Status"; a table titled "Employees" showing columns for Name, Employee Code, Email, Mobile, Plant, Verified, and Actions; and a message "3 Employees Found".

- 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.

Add New Employee X

* Name

* Employee Code

* Plant
 🔍

abc

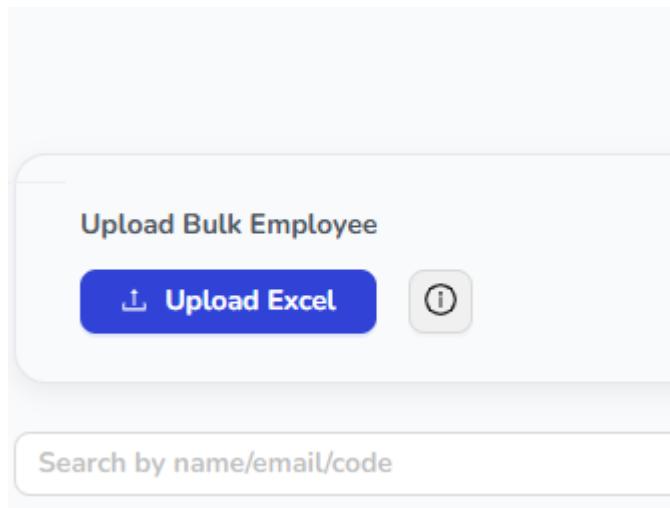
XYZ

* Email

* Password
 👁️

Cancel Submit

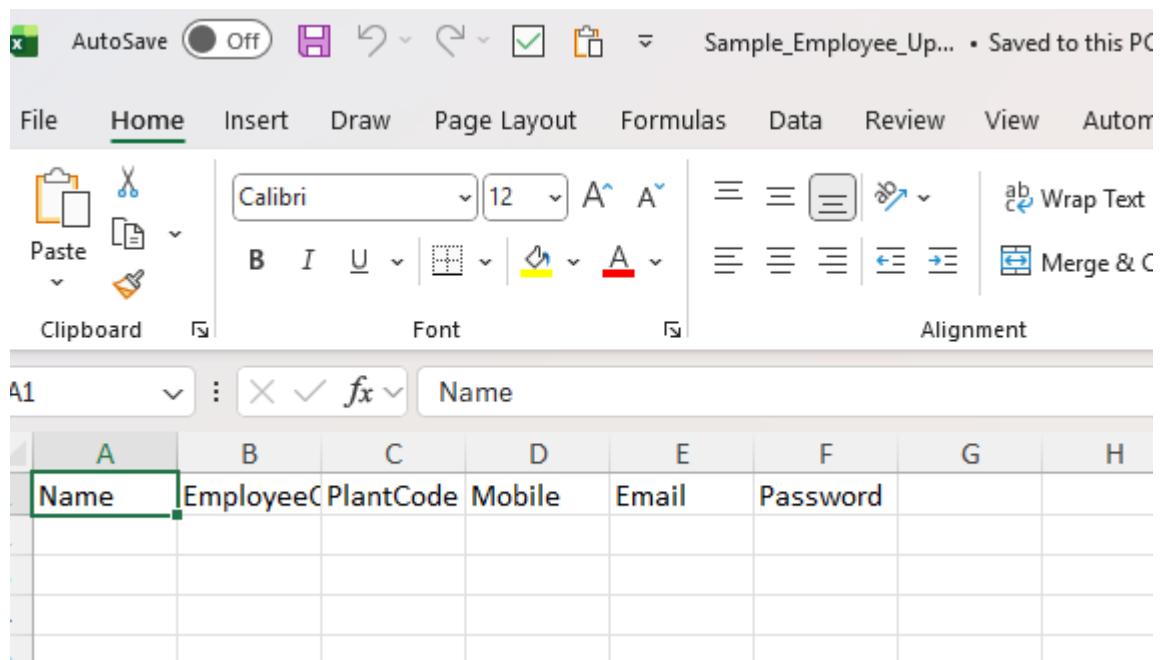
b. Bulk Employee Creation



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

A screenshot of the full ERPICA employee management interface. At the top left is a "Free Trial" button, and at the top right is an "Activity Tracker" button. The main area contains a "Upload Bulk Employee" section with a "Upload Excel" button and a help icon. To the right is a "Download / Export Employee Details" section with "Download Template" and "Export All Employees" buttons. Below these are search and filter fields: "Search by name/email/code", "Filter by Plant", "Filter by Status", and an "Add Employee" button. At the bottom, it shows "Employees" and "3 Employees Found".

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



A screenshot of Microsoft Excel showing a table with columns: Name, EmployeeID, PlantCode, Mobile, Email, and Password. The 'Name' column is selected, indicated by a green border around cell A1. The Excel ribbon is visible at the top, showing tabs like File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, and Autom. The Home tab is selected. The Font group on the ribbon shows Calibri, 12pt, and various bold, italic, underline, and color options. The Alignment group shows horizontal alignment icons. The table has a header row with these column names.

Name	EmployeeID	PlantCode	Mobile	Email	Password

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 Information

Employee ID	Company Email ID
TSPL114	Radha.sharma12308@gmail.com
First Name	Middle Name
Radha	
Last Name	Blood Group
Sharma	O +
Gender	Date of Birth
Female	2001-01-15
Contact Number	Personal Email ID
9560519281	Radha.sharma12308@gmail.com
Department	Date of Joining
HR01	2025-11-01
Status	User Role
active	employee

Profile

- [Employee Information](#)
- [Address Information](#)
- [Emergency Contact Details](#)
- [Education Details](#)
- [Experience Details](#)
- [Bank Details](#)
- [Aadhar And PAN Details](#)
- [Update Password](#)

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**.

The screenshot displays a user interface for managing permissions and viewing employee details. On the left, a sidebar shows a tree view of HRMS features: Dashboard, Employee (selected), Plants, Attendance, Leave, Asset, Expenses, Task Manager, and Payroll N. The main area is divided into two sections: 'Feature Permissions' and 'Assign Permissions'. 'Feature Permissions' lists various management modules with 'Allow' or 'Deny' checkboxes. 'Assign Permissions' allows selecting a plant and adding specific features to it. To the right, a panel titled 'Employee Details' lists various personal and professional information fields.

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.



● Total Assets
3
● Assigned
1
● Available
1
● Expired
0
● Under Maintenance
1
● Disposed
0

Search assets...
Filter by Asset Type
Refresh
Export

Asset Details						
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 >

Asset Management

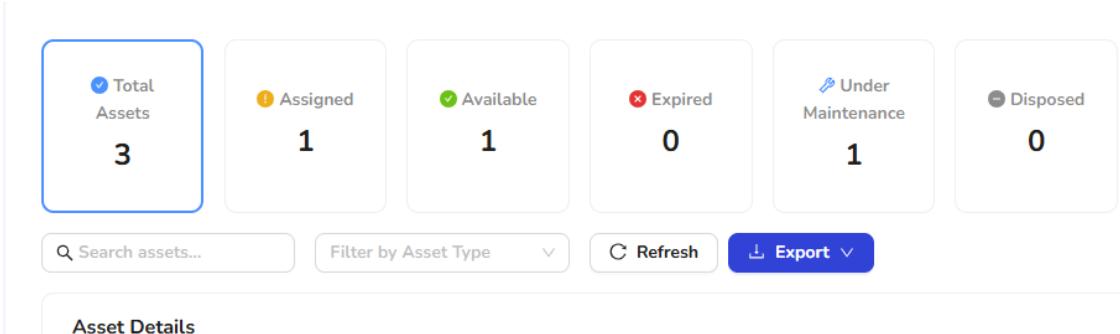
- 🕒 Dashboard
- ☒ Asset Type
- ✚ Add Asset
- ⚡ Tickets
- ⌚ Activity Tracker

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

Assets are tracked so the company knows:

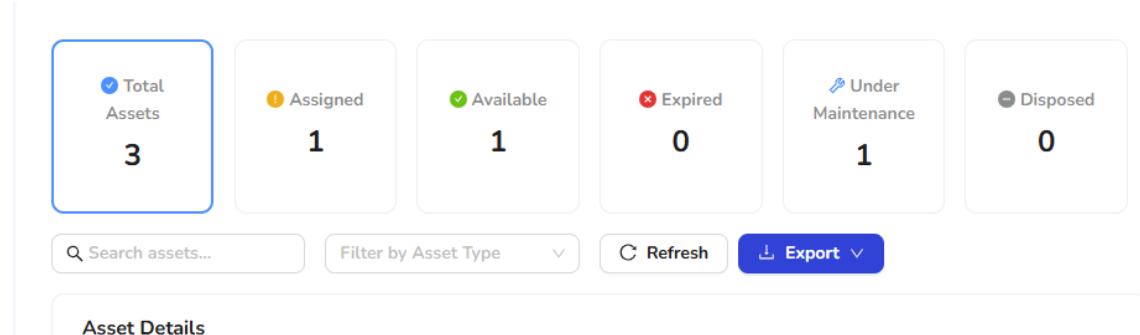
- Who is using which asset
- Where the asset is assigned
- Asset condition and status

- 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.

The screenshot shows a dashboard titled "Asset Management". At the top, there is a dropdown menu labeled "Select Plant : abc". Below it, six status boxes show counts: Total Assets (0), Assigned (0), Available (0), Expired (0), Under Maintenance (0), and Disposed (0). There are also search and filter buttons ("Search assets...", "Filter by Asset Type"), a refresh button, and an export button. A sidebar on the right lists navigation options: Dashboard, Asset Type, Add Asset, Tickets, and Activity Tracker.

Editing the Assets details:

The screenshot shows an "Edit Asset" modal over a list of assets. The modal has a title "Edit Asset" and a required field "Action to Perform" with a dropdown menu containing the following options: Assign Asset, Unassign Asset, Transfer Asset, Returned Asset, Update Asset Details, Mark as Under Maintenance, Mark as Repaired, and Mark as Expired. The background shows a table of assets with columns: Asset Name, Serial Number, and Type. The table contains three entries: Dell Laptop, TSPL/L/01, Laptop; HP Laptop, TSPL/L/02, Laptop; and Laptop, TSPL/L/03, Laptop. A sidebar on the right shows links for Asset Type, Add Asset, Tickets, and Activity Tracker. At the bottom, it says "Total 3 items" with a page number "1".

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

Edit Asset

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

Cancel
Update

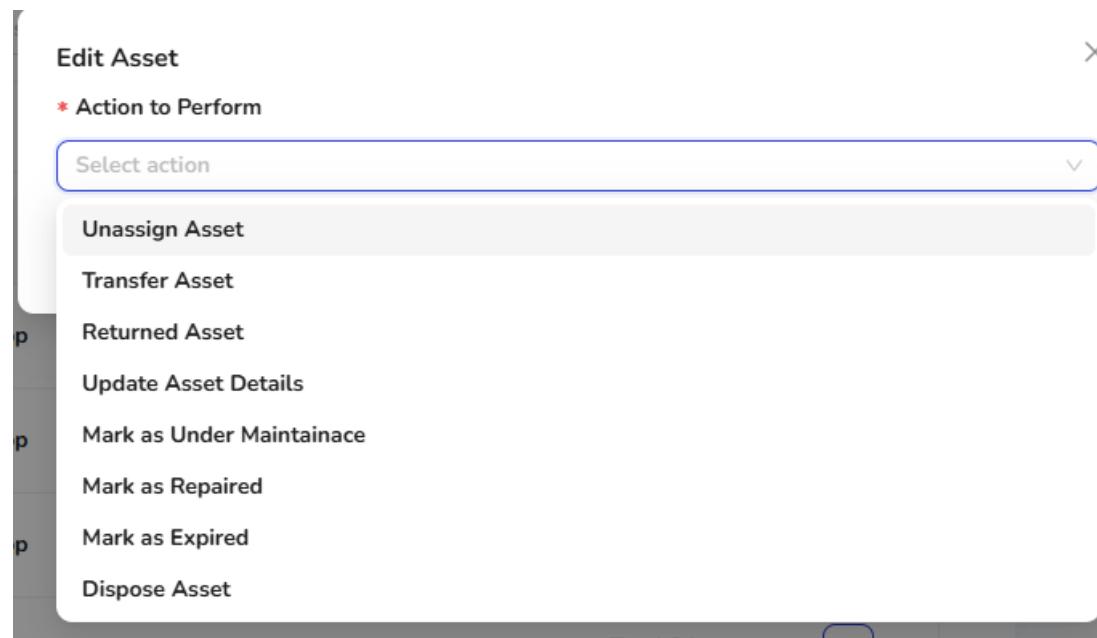
✓ Available ✗ Expired ▼ Under Maintenance ● Disposed

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.

Laptop
Serial Number: TSPL/L/03

Assigned

Asset Type Laptop	Manufacturer Lenevo	Assigned To Vibhu Maheshwari	Responsible Radha Sharma
Location Uttarakhand	Purchase Date N/A	Expiry Date N/A	
Description No Description	Remarks Returned for repairing its Screen		

TRANSFERRED
Performed By: Temflo System Pvt. Limited (-)
Transfer Date: 2025-12-03 [2025-11-28 14:43]

From
Assigned: Madhav Maheshwari
Status: Assigned
Responsible: Radha Sharma

To
Assigned: Vibhu Maheshwari
Status: Assigned
Responsible: Radha Sharma

Remarks: Transferred from 691ede6684cb8b503b0cfa4 to 691edf58684cb8b503b0d107

Status Changed: 2025-11-29 [2025-11-28 14:40]

From
Assigned: Madhav Maheshwari
Status: Under Maintenance
Responsible: None

To
Assigned: Madhav Maheshwari
Status: Assigned
Responsible: None

Remarks: Asset repaired → status changed to Assigned by Temflo System Pvt. Limited

UNDER_MAINTAIN
Performed By: Temflo System Pvt. Limited (-)
Status Changed: 2025-11-28 [2025-11-28 14:40]

From
Assigned: Madhav Maheshwari
Status: Assigned
Responsible: None

To
Assigned: Madhav Maheshwari
Status: Under Maintenance
Responsible: None

Remarks: Returned for repairing its Screen

CREATED
Performed By: Temflo System Pvt. Limited (-) [2025-11-28 14:36]

From
Assigned: None
Status: N/A
Responsible: None

To
Assigned: None
Status: Available
Responsible: Radha Sharma

Remarks: Asset created in the system

No more history

b. Asset Type:

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

The screenshot shows a user interface for managing assets. At the top, there is a dropdown menu labeled "Select Plant" with "abc" selected. Below this is a button labeled "+ Add Asset Type". The main area displays a table with four columns: "Asset Type", "Description", and "Actions" (with icons for edit and delete). The table contains the following data:

Asset Type	Description	Actions
Software- AutoCAD	Designing Software	
Laptop	Laptop	
CPU	—	
Mouse	—	

At the bottom right of the table, there is a page navigation indicator showing "1" of 1.

Asset Management

- Dashboard
- Asset Type
- Add Asset
- Tickets
- Activity Tracker

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. Bulk Uploads

d. Add Asset

Bulk Upload Assets (Excel)

Upload Excel File

[Upload Excel](#) [Download Template](#)

Add New Asset

* Asset Name

* Asset Type

* Serial Number

Description

Remarks

Location

Manufacturer

Responsible (optional)

Purchase Date

Expiry Date

[Add Asset](#)

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

e. Tickets

Asset Management

Pending Requests: 0

Completed: 0

Rejected: 0

Total Requests: 0

Asset Transfer Requests

Asset Details	Status	Request Date	Reason	Actions
No transfer requests found				

- Dashboard
- Asset Type
- Add Asset
- Tickets
- Activity Tracker

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

Attendance

Present: 0

Pending: 0

Not marked: 3

No data

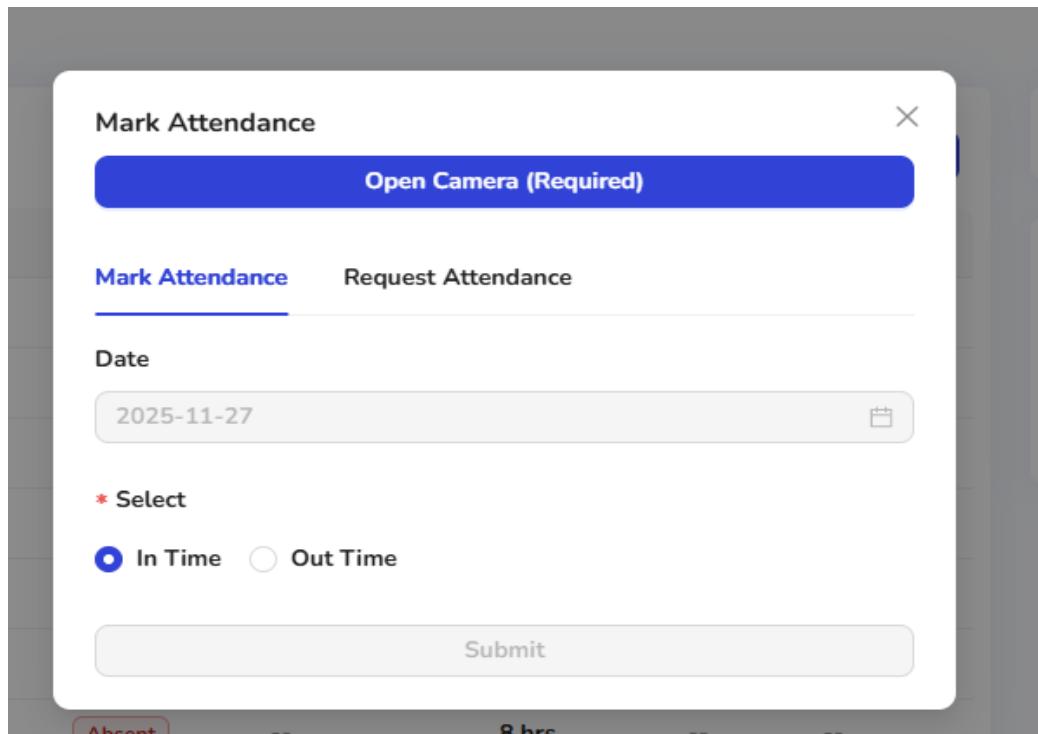
Attendance Details

Employee	Email	Approver	Status	Time	Action
No data					

- Dashboard
- Mark Attendance
- Holidays
- Attendance Rules
- Attendance Policy
- Activity Tracker

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.

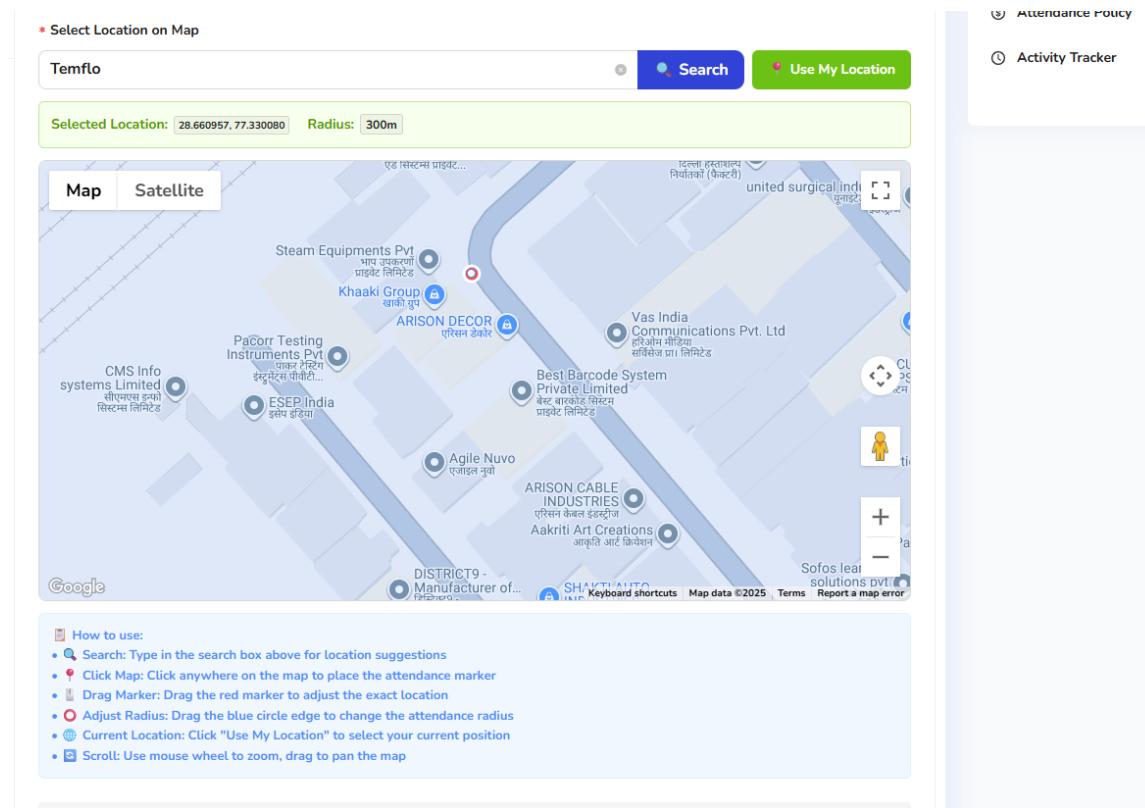
e. Attendance Policy

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

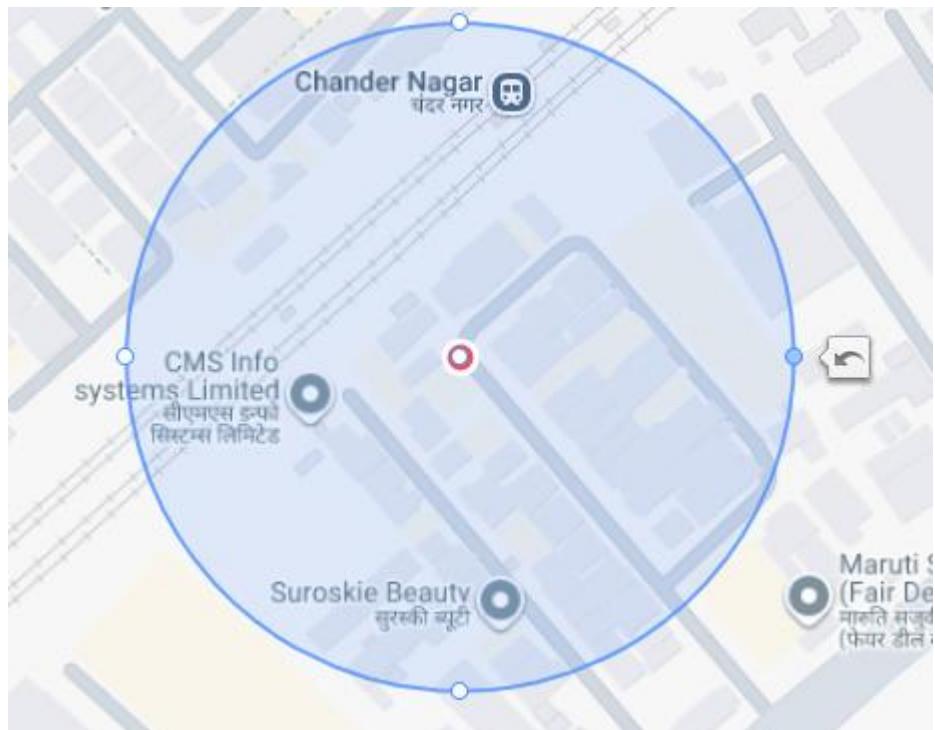
This section lets you set up Employee Attendance Rules for each individual team member. You can select an employee from the dropdown and customize how their attendance should work.

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.



Selected Location:
Lat: 28.660957, Lng: 77.330080, Radius: 300m

Working Hours

09:05

18:00

8

Weekly Offs

Sunday Monday Tuesday
 Wednesday Thursday Friday
 Saturday

Remote Days

Sunday Monday Tuesday
 Wednesday Thursday Friday
 Saturday

Save Settings

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 employee.

Policy Name	Location Based	Approval Required	Marking Enabled	Actions
2025 Standard Work Schedule	No	No	No	View Edit Delete

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	--	--

Attendance

- [Attendance History](#)
- [Attendance Requests](#)

9. Expenses

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

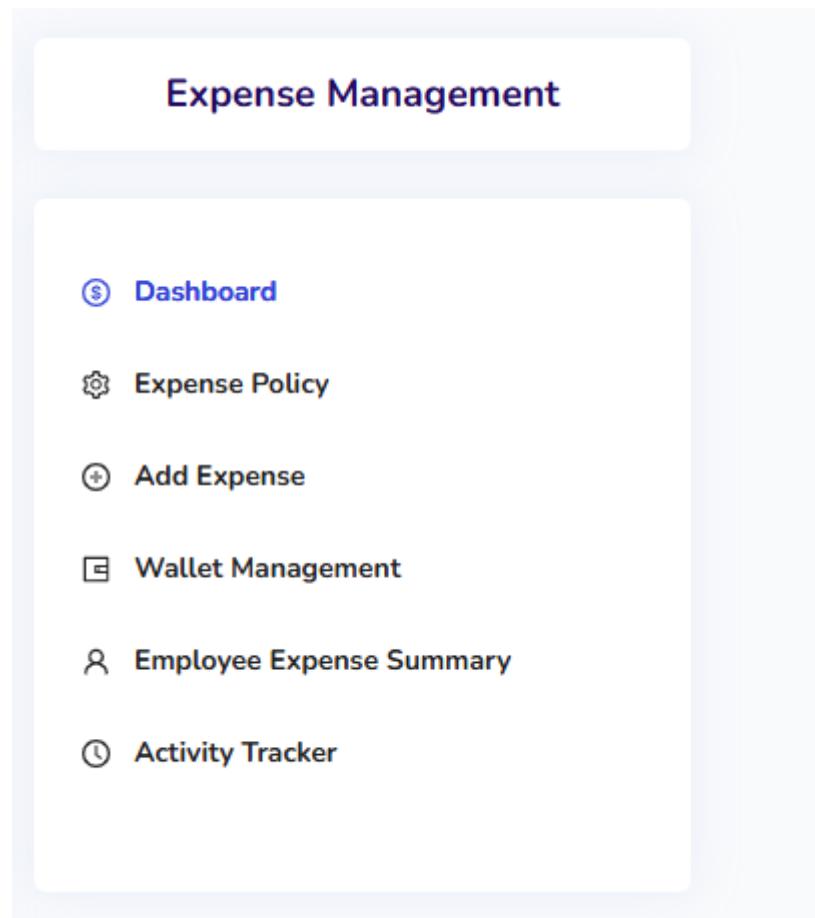
Common examples of company expenses

- 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

The screenshot shows the 'Expense Management' dashboard for a plant named 'abc'. At the top, there's a dropdown menu for 'Select Plant' with 'abc' selected. Below it, four summary boxes show the total number of expenses (4), under review (2), claimed (2), and rejected (0). To the right is a sidebar titled 'Expense Management' with links to various sections like Dashboard, Expense Policy, Add Expense, Wallet Management, Employee Expense Summary, and Activity Tracker.

Total Expenses	Under Review	Claimed	Rejected
4	2	2	0

Below the summary are three numerical values: Total Expense Amount (₹1400), Claimed Amount (₹300), and Remaining Amount (₹1100). There are also search and filter options.

Expenses								
Employee	Category	Subcategory	Amount	Wallet Status	Submitted	Status	Actions	
Madhav Maheshwari	Stay (Hotel)		₹1000	Not Deducted	29/11/25	Under review	View	
Madhav Maheshwari	Travel	Metro	₹100	Not Deducted	28/11/25	Under review	View	

At the bottom, it says 'Total 2 items' with page navigation controls (1).

For Owner's approval:

Expense Details

X

Employee Code

TSPL001

* Category

Stay (Hotel)

Subcategory

(Select)

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

The screenshot displays a mobile application interface for expense reporting. At the top, there is a "View File" button and an "Upload New Files" section with a "Select Files" button and a placeholder "No file chosen". Below this is an "Editable Form Fields" section with mandatory fields: "Location" (set to "Uttarakhand") and "Project" (set to "UVNL"). A "Save Updates" button is located below these fields. Further down, there is a "Discussion between Approver and Employee" section, which includes a text input field with the placeholder "Write a message..." and a "Send Message" button.

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.

The screenshot shows a dashboard titled "Expense Management". At the top, there is a dropdown menu labeled "Select Plant" with "abc" selected. Below it is a table with three rows:

Category	Subcategories	Actions
Travel	Cab Metro Railway	<button>Edit</button> <button>Delete</button>
Stay (Hotel)	No subcategory found	<button>Edit</button> <button>Delete</button>
Food	No subcategory found	<button>Edit</button> <button>Delete</button>

On the right side, there is a sidebar titled "Expense Management" with the following options:

- Dashboard
- Expense Policy
- Add Expense
- Wallet Management
- Employee Expense Summary
- Activity Tracker

c. Add Expenses

Steps to apply or set the expense for employees:

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

The screenshot shows the "Custom Form Builder" interface for a "Custom Expense Form Builder". On the left, there is a section titled "Add Fields" with several input fields and dropdown menus. On the right, there is a "Preview Form" section with corresponding input fields and validation messages.

Add Fields

- Amount
- number
- Required
- Category
- select
- Required
- Subcategory
- select
- Required
- Upload Documents
- file
- .jpg,.jpeg,.png,.pdf
- Required
- Location
- Text
- Required
-

Preview Form

- * Amount
- * Category
- * Subcategory
- * Upload Documents
- * Location
- * Project
-

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

* Employee * Amount (INR)

Select employee Enter amount

* Category Subcategory

Select category No subcategories available

* Upload Expense Documents

Upload Files

* Location

Enter Location

* Project

Enter Project

Expense Management

- Dashboard
- Expense Policy
- Add Expense**
- Wallet Management
- Employee Expense Summary
- Activity Tracker

Submit Expense

The screenshot shows the 'Add New Expense' form on the left and the 'Expense Management' sidebar on the right.

Add New Expense Form Fields:

- Employee:** Madhav Maheshwari (TSPL001) - employee
- Amount (INR):** 1000
- Deduct from Selected Employee's Wallet Balance (Current Balance: ₹2800):** Unchecked
- Category:** Stay (Hotel)
- Subcategory:** No subcategories available
- Upload Expense Documents:** download.jpeg
- Location:** Uttarakhand
- Project:** UIVNL
- Submit Expense** button

Expense Management Sidebar:

- 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.

The screenshot shows the 'Expense Management' sidebar on the right and the 'Employee Wallet Balances' table on the left.

Employee Wallet Balances Table Headers:

- Employee
- Plant
- Wallet Balance
- Status
- Last Updated
- Actions

Data in Table:

Employee	Plant	Wallet Balance	Status	Last Updated	Actions
Madhav Maheshwari TSPL001	abc	₹ 2,800.00	Active	29/11/2025 11:52	Add Balance
Radha Sharma TSPL114	abc	₹ 100.00	Active	25/11/2025 18:48	Add Balance
Vibhu Maheshwari TSPL107	abc	₹ 0.00	Active	20/11/2025 14:58	Add Balance

Pagination: 1-3 of 3 employees < 1 > 10 / page

Expense Management Sidebar:

- Dashboard
- Expense Policy
- Add Expense
- Wallet Management
- Employee Expense Summary
- Activity Tracker

e. Employee Expense Summary

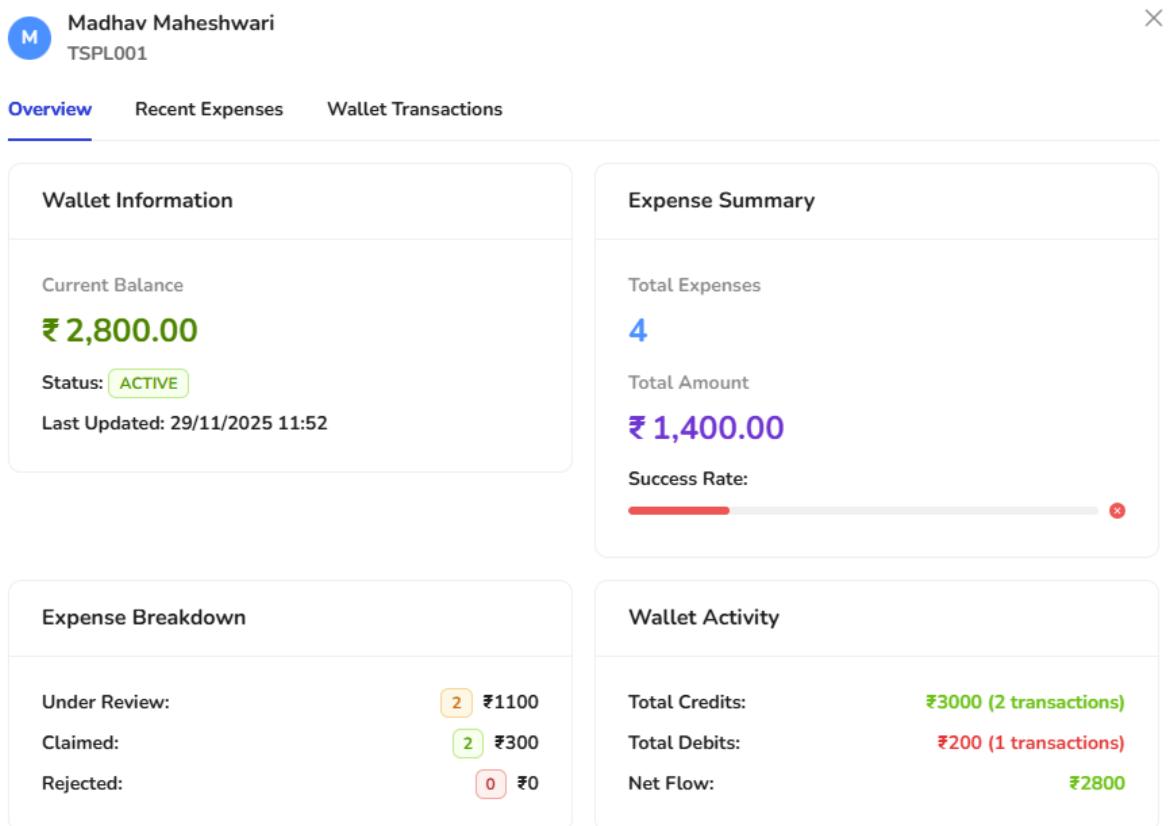
The screenshot displays the Employee Expense Summary interface. At the top, there are four summary boxes: 'Total Employees' (3), 'Total Expenses' (4), 'Total Amount' (₹1,400), and 'Total Wallet Balance' (₹2,900). Below these are search and filter fields ('Search employees...', 'Start Date', 'End Date', 'Refresh', 'Export'). The main section is titled 'Employee Expense Summary' and lists three employees:

Employee	Wallet	Expenses	Amount	Activity	Action
Madhav Maheshwari TSPL001	₹2,800 ACTIVE	Total: 4 2 2 0	₹1,400 Claimed: ₹300	Credits: ₹3,000 Debits: ₹200	View
Vibhu Maheshwari TSPL107	₹0 ACTIVE	Total: 0 0 0 0	₹0 Claimed: ₹0	Credits: ₹0 Debits: ₹0	View
Radha Sharma TSPL114	₹100 ACTIVE	Total: 0 0 0 0	₹0 Claimed: ₹0	Credits: ₹100 Debits: ₹0	View

At the bottom, it shows '1-3 of 3 employees' and a page navigation bar ('10 / page'). To the right, a sidebar titled 'Expense Management' lists various options: Dashboard, Expense Policy, Add Expense, Wallet Management, Employee Expense Summary (which is selected and highlighted in blue), and Activity Tracker.

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.

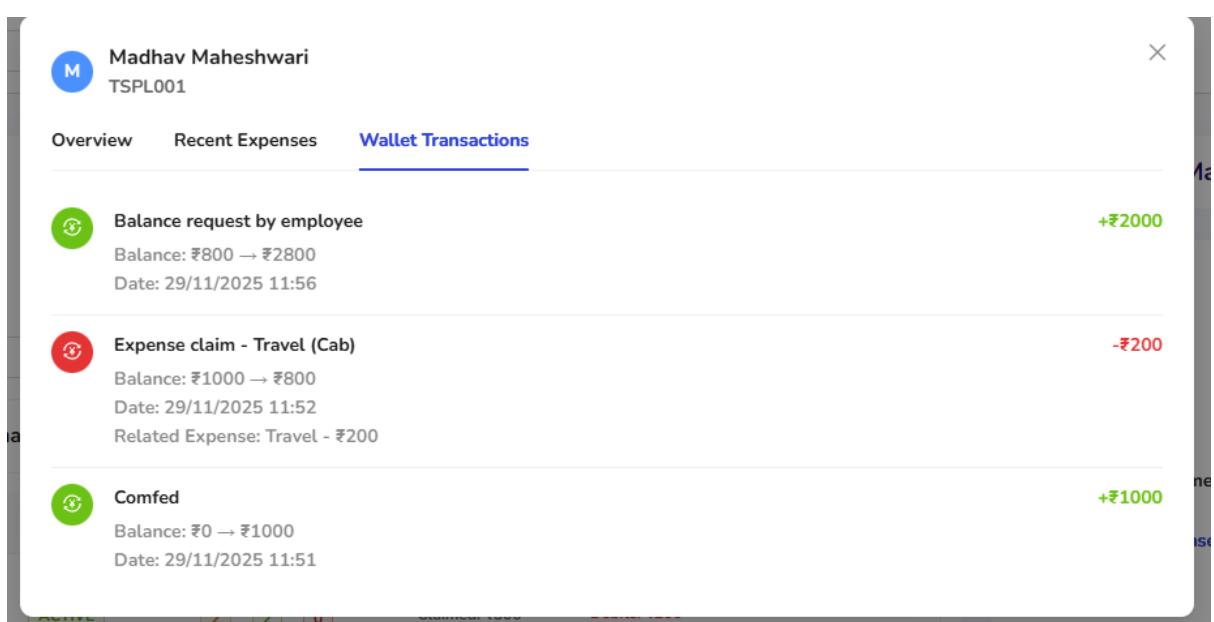
This screenshot is identical to the one above, showing the Employee Expense Summary page with three employees listed. A red box highlights the 'View' button for the first employee, Madhav Maheshwari. The sidebar on the right remains the same, showing the 'Employee Expense Summary' option is selected.



The screenshot shows a mobile application interface for managing an employee's wallet. At the top, there is a profile section with a blue circular icon containing a white letter 'M', followed by the name "Madhav Maheshwari" and the ID "TSPL001". A close button "X" is located in the top right corner.

Below the profile, there are four main sections:

- Overview**: Shows the current balance of ₹2,800.00, status as ACTIVE, and last updated on 29/11/2025 at 11:52.
- Expense Summary**: Displays total expenses of 4 transactions amounting to ₹1,400.00, with a success rate indicated by a red progress bar.
- Expense Breakdown**: Details under review (₹1100), claimed (₹300), and rejected (₹0) transactions.
- Wallet Activity**: Shows total credits of ₹3000 (2 transactions), total debits of ₹200 (1 transaction), and net flow of ₹2800.



The screenshot shows a detailed transaction history for the employee. The top part of the screen is identical to the first one, showing the profile and basic wallet information.

The main content area displays a list of transactions:

- Balance request by employee**: An increase of +₹2000. Balance: ₹800 → ₹2800. Date: 29/11/2025 11:56.
- Expense claim - Travel (Cab)**: A decrease of -₹200. Balance: ₹1000 → ₹800. Date: 29/11/2025 11:52. Related Expense: Travel - ₹200.
- Comfed**: An increase of +₹1000. Balance: ₹0 → ₹1000. Date: 29/11/2025 11:51.

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. Leave Management

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

Common types of leaves

- 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.

How leave balance works?:

- 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

The screenshot shows a 'Leave Management' interface. At the top, a dropdown menu says 'Select Site: abc'. Below it, the 'Leave Dashboard' section displays 'Leave Balances' for 'Madhav Maheshwari (TSPLO01)'. It shows 'Remaining' leaves as 10.5 and 'Used' leaves as 2. A note at the bottom says 'Last Created: 29 Nov 2025'. To the right, a sidebar titled 'Leave Management' lists 'Leave Balance', 'Leave Requests', 'Leave Policy', and 'Activity Tracker'. The main area below the dashboard shows 'Leave Requests (December 2025)' for the month of December 2025. There is one pending request from 'Fixed Leaves' on 30 Nov 2025, and one approved request from 'Fixed Leaves' on 29 Nov 2025.

Leave Type	From	To	Duration	Status	Requested On	Action
Fixed Leaves	30 Nov 2025	30 Nov 2025	Full Day	Pending	29 Nov 2025	View
Fixed Leaves	29 Nov 2025	29 Nov 2025	Full Day	Approved	29 Nov 2025	View

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.

Requests
3

Pending
0

Approved
2

Rejected
0

Start date
→ End date

Employee Code	Email	Leave Type	From	To	Status	Actions
TSPL001	madhav@temflo.co.in	Fixed Leaves	2025-11-30	2025-11-30	Pending	<input type="button" value="View / Edit"/>
TSPL001	madhav@temflo.co.in	Fixed Leaves	2025-11-29	2025-11-29	Approved	<input type="button" value="View / Edit"/>
TSPL114	Radha.sharma12308@gmail.com	Paid Leaves	2025-11-20	2025-11-20	Approved	<input type="button" value="View / Edit"/>

Total 3 items < 1 >

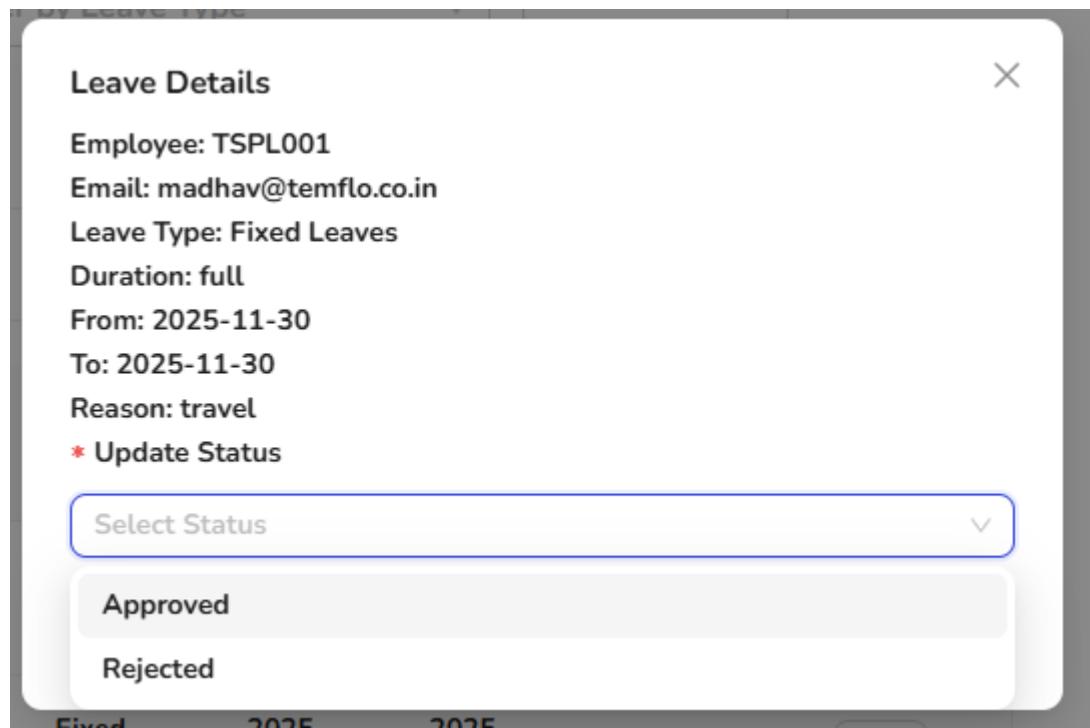
Leave Management

Leave Balance

Leave Requests View

Leave Policy

Activity Tracker



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

The screenshot shows a leave management application interface. At the top, there is a dropdown menu labeled "Select Site" with "abc" selected. Below it is a toolbar with a blue button "+ Add Leave Policy" and a "Refresh" button.

Leave Type	Type	Leave Count	Credit	Expiry	Active	Actions
Paid Leaves	Leave	30	yearly on 1	Never	<input type="radio"/> Inactive	
Fixed Leaves	Leave	7.5	quarterly on 1	Never	<input checked="" type="radio"/> Active	

On the right side, there is a sidebar titled "Leave Management" with the following options:

- Leave Balance
- Leave Requests
- Leave Policy** (highlighted in blue)
- Activity Tracker

The current page number is 1, indicated by a blue-bordered box.

Policy Details

X

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

X

* Leave Type

Fixed Leaves

* Type

Leave

* Total Leaves

7.5

* Credit Frequency

Quarterly

Credit Day

1

* Expiry Frequency

Never

Expiry Day (if not custom)

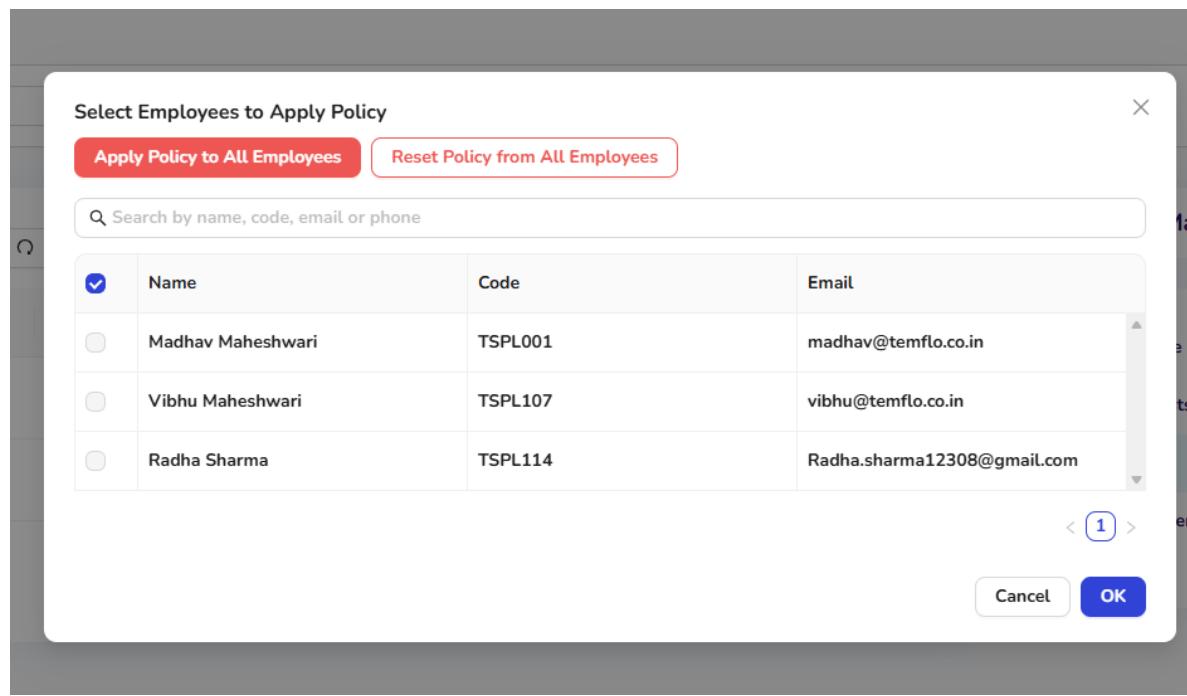
* Expire Ratio

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:

Select Plant : abc

Workspaces 2

Total Projects 2

Total Tasks 0

Search Workspaces... Filter By Status Refresh + Create Workspace

Workspaces 2 Workspaces Found

Task Manager

Dashboard

Activity Tracker

To create a workplace:

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

The screenshot shows a modal dialog box titled "Create Workspace". At the top left is a magnifying glass icon. Below the title is a field labeled "Workspace Name" with a red asterisk, containing the placeholder "Enter workspace name". Underneath is a "Description" section with a placeholder "Enter workspace description (optional)". At the bottom left is a "Cancel" button, and at the bottom right is a blue "Create Workspace" button with a white plus sign.

[← Back To Dashboard](#)

Projects For Workspace: Accounts

Create Project

Manage Projects And View Workspace Information

Total Projects: 3

Active Projects: 3

Inactive Projects: 0

Total Tasks: 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	jhjkjhk	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

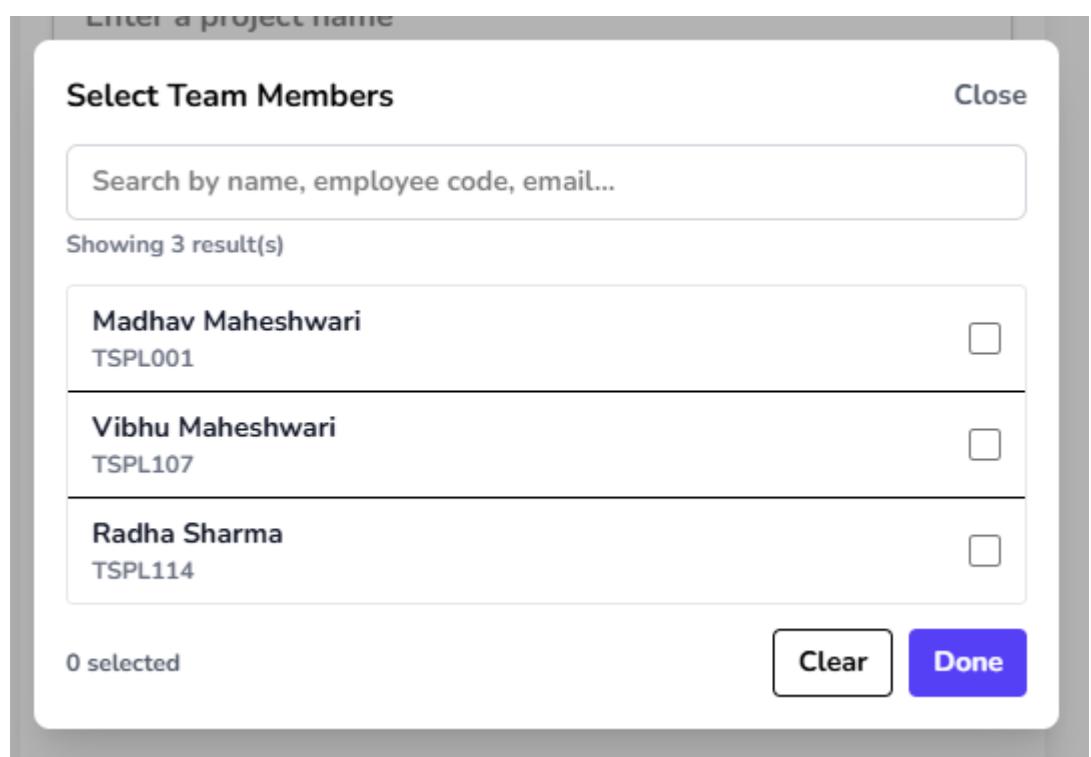
Press Enter to add tag

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.

← Back To Dashboard

Projects For Workspace: Accounts

Create Project

Manage Projects And View Workspace Information

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	jhkjhjk	Active	0	11/29/2025	
Bills Receivables	abc	Active	0	11/29/2025	

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

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

The screenshot shows the 'Advance Payment' project card in the Accounts workspace. At the top, there are buttons for 'Back To Workspace', '+ Add Task', and 'Edit Project'. Below the title, it says 'Advance'.

Key statistics for tasks:

Total Tasks	Todo Tasks	In Progress	Under Review	Completed
3	1	0	1	1

Below the statistics are filters: 'Search Tasks...', 'Filter Status', 'Filter Priority', 'Filter By Tags', 'Created Fr...', 'Created To', 'Filter By Due Date', 'Refresh', 'Clear All Filters', and a search icon.

The main area displays a table of tasks:

Task Detail	List View	Activities/Timeline	Project Description	Attachments/Upserts
Backlog (1)	Todo (0)	In Progress (0)	Under Review (1)	Completed (1)
Vouchers Payment task-a55	Drop tasks here	Drop tasks here	December 2nd Week Payments Payment Advance task-b6e	abc Advance task-9be

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

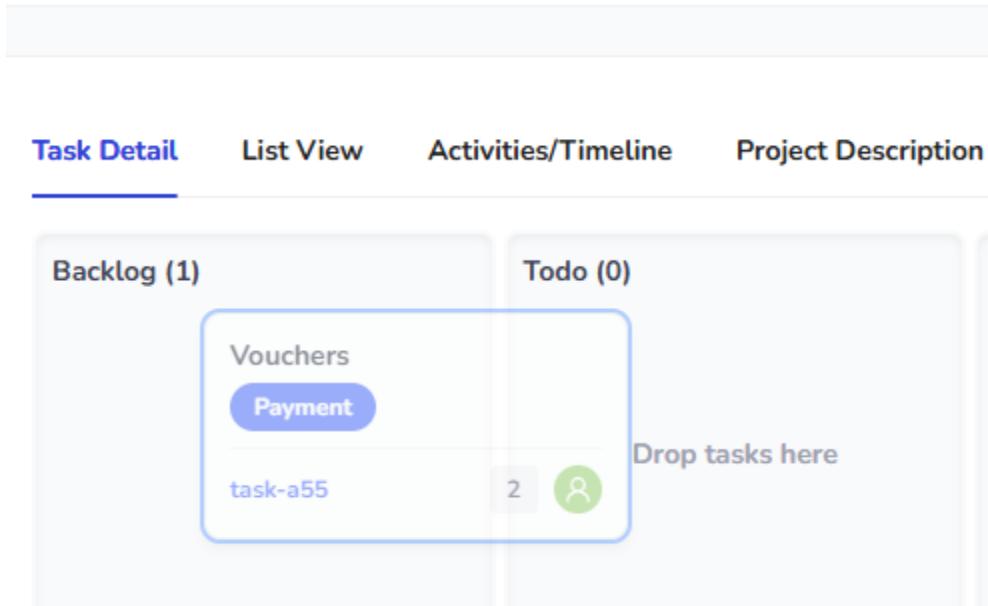
Below that, the Task Detail board visually displays every task category such as:

- 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 screenshot provides a detailed view of the 'task-a55' card. At the top, there are buttons for 'Back To Project', '+ Add Subtask', 'Edit', and 'Delete'. The card itself is titled 'Vouchers' and includes fields for 'Status' (Backlog) and 'Priority' (Medium). Below the title, four status indicators are shown: 'Total Subtasks' (0), 'Todo' (0), 'In Progress' (0), and 'Completed' (0). The 'Task Information' section contains details such as 'Description' (Vouchers), 'Assigned To' (a user icon), 'Created' (12/1/2025), 'Due Date' (12/6/2025), and 'Story Points' (2). The 'Task Details' section includes 'Project' (Advance Payment), 'Tags' (Payment), and 'Progress' (0 %, 0 of 0 subtasks completed).

The screenshot displays a task management interface with several sections:

- Attachments/Uplodas**: A section for uploading files with a placeholder text "Click to upload or drag and drop" and a note about supported file types: PDF, DOC, DOCX, XLS, XLSX, TXT, CSV, ZIP, RAR, Images (max 10MB).
- Recent Activity**: A section titled "Activity Timeline Coming Soon".
- Subtasks**: A table with columns: Subtask Code, Subtask Title, Status, Priority, Assigned, and Actions. It shows a single row with the message "No Subtasks found".
- Comments**: A section for adding comments with a text input field "Add A Comment..." and a "Add Comment" button. Below the input field are several small buttons with icons and text: "Looks good!", "Need help?", "This is blocked...", "Can you clarify...?", and "This is a good idea".

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.

The screenshot shows the 'Payroll Management' interface. On the left, there's a search bar labeled 'Search Employee Batch' with a placeholder 'Search employee by name, code, or email'. Below it is a table titled 'Salary Batches' with the following data:

Batch Name	Description	Employee Count	Status	Last Payroll Run	Actions
Temp Staff	Temp.	2	Active	Never	...
Backoffice	Old employees (...)	2	Active	12/1/2025	...

On the right, a sidebar lists navigation options under 'Payroll Management': Dashboard, Define Batches, Run Payroll, Payroll Summary, Allowances, Deductions, and Settings. The 'Define Batches' option is highlighted. At the bottom center of the page, there's a page number '1' in a blue box with arrows for navigation.

+ Create Batch

Last Payroll Run	Actions
Never	...
12/1/2025	<ul style="list-style-type: none">⊕ View Details⊖ Edit⇄ Assign Employees⊗ Deactivate

Batch Details - Temp Staff X

Batch Information

Batch Name	Status
Temp Staff	Active
Description	
Temp.	
Last Payroll Run	Total Employees
Never	2

Salary Structure

Basic Components:

Basic Salary: Included HRA: Included Special Allowance: Not Included

Assigned Employees (2)

Madhav Maheshwari	Remove
Radha Sharma	Remove

⇄ Assign New Employees Close

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

Edit Batch

* Batch Name * Status

Temp Staff Active

Description

Temp.

Define Salary Structure

i Define Salary Structure

Select which salary fields this batch will include. Individual values will be assigned per employee later during payroll execution.

Include Basic Salary Include HRA Include Special Allowance

Yes

Allowances

+ Add Allowance

Deductions

+ Add Deduction

Cancel Update

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

The screenshot shows the 'Manage Allowances' section of a payroll management application. At the top right is a blue button labeled '+ Create Allowance'. Below it is a table with columns: Code, Name, Mapping, Taxable, PF Applicable, ESI Applicable, Status, and Actions. A single row is visible, showing 'SA' as the code, 'Special Allowance' as the name, 'SPECIAL' as the mapping, 'No' as taxable, 'No' as PF Applicable, 'No' as ESI Applicable, 'Active' as status, and an ellipsis for actions. The table has navigation arrows at the bottom right. To the right of the main content is a sidebar titled 'Payroll Management' with a list of links: Dashboard, Define Batches, Run Payroll, Payroll Summary, Allowances (which is currently selected), Deductions, and Settings.

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.

Create Allowance

X

* Allowance Code

e.g., HRA, TA

* Allowance Name

e.g., House Rent Allowance

Description

Allowance description

* Mapping

Select mapping

Calculation Type

Fixed Amount

* Taxable

Yes

Section

e.g., 10(13A)

PF Applicable

No

ESI Applicable

No

PT Applicable

No

LOP Dependent

Yes

Max Limit

₹ 0

Notes

Additional notes

Cancel

Create

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**

Code	Name	Mapping	Based On	Taxable	LOP Dependent	Status	Actions
PF	Provident Fund	PF	BASIC	No	✓	Active	...

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 screenshot shows the Payroll Management application. On the left, there's a 'Payroll Settings' panel with tabs for 'Pay Period', 'Payslip Settings', and 'Email Settings'. Under 'Pay Period', fields for 'Start Day' (1), 'End Day' (31), and 'Payment Day' (1) are visible, along with 'Reset to Default' and 'Save Settings' buttons. To the right is a sidebar titled 'Payroll Management' with links like Dashboard, Define Batches, Run Payroll, Payroll Summary, Allowances, Deductions, and 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.

Pay Period **Payslip Settings** Email Settings

i Company Branding

Configure company name, logo, and address to be displayed on payslips

* Company Name

TSPL

Company Logo ⓘ

Change Logo Ⓢ Preview Remove

Recommended size: 200x60px

Company Address

Enter company address (optional)

Display Options

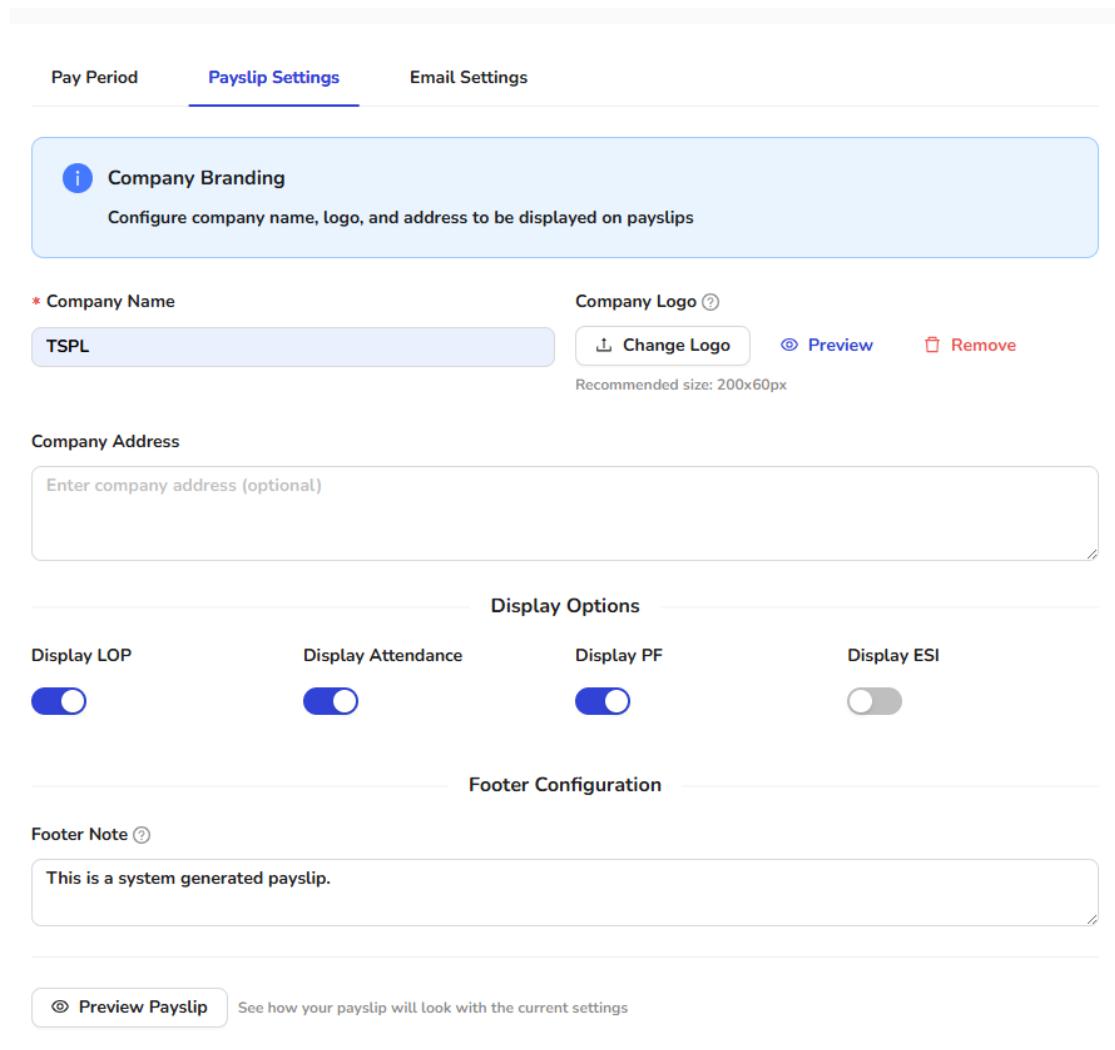
Display LOP Display Attendance Display PF Display ESI

Footer Configuration

Footer Note ⓘ

This is a system generated payslip.

Preview Payslip Ⓢ See how your payslip will look with the current settings



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.

 **Email Configuration**

Configure the email template that will be sent to employees along with their payslips. Use the variables below to personalize the email.

Send Payslip Email

Enable automatic email sending when payroll is executed



Email Subject

* Subject line for the payslip email

Your Salary Slip for {month} {year}

Email Body

* Email content that will be sent to employees

Dear {employeeName}, Please find attached your salary slip for {month} {year}.

Available Variables:

{employeeName} Employee's full name

{month} Pay period month

{year} Pay period year

{totalEarnings} Total earnings amount

{totalDeductions} Total deductions amount

{netSalary} Net salary amount

 **Preview Email**

Click to see how the email will look with sample data

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:

- o {employeeName} – Employee's name
- o {month} – Salary month
- o {year} – Salary year
- o {totalEarnings} – Total amount earned
- o {totalDeductions} – Total deductions
- o {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

1 Select Batch & Period 2 Assign Salary Values 3 Review Attendance 4 Select Salary Slip Templ 5 Review & Execute

*** Select Batch**

*** Select Month**

X

Next

- Payroll Management

-  [Dashboard](#)
 -  [Define Batches](#)
 -  [Run Payroll](#)
 -  [Payroll Summary](#)
 -  [Allowances](#)
 -  [Deductions](#)
 -  [Settings](#)

1 Select Batch & Period — 2 Assign Salary Values — 3 Review Attendance — 4 Select Salary Slip Templa 5 Review & Execute

*** Select Batch**

Select Batch

▼

Temp Staff (2 employees)

Backoffice (2 employees)

*** Select Month**

2025-12

□

Next

- ## Payroll Management

-  Dashboard
 -  Define Batches
 -  Run Payroll
 -  Payroll Summary
 -  Allowances