Project Edulead

USER MANUAL

Human Resource Management System(HR)

May 2021, Version 1.0

Sustainable Outreach and Universal Leadership Limited

Sign off Date **Signature Client**

Sustainable Outreach and Universal Leadership Limited
Ground Floor, New Block, Campus 1, Near Allahabad Bank, KIIT Patia, Bhubaneshwar - 751024
Phone: +91- 7077769334/35/36 **Email:** soul@soulunileaders.com

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About this Manual

This User Manual acts as a reference for ERP- **EduLead** by describing its various concepts and abilities, and by leading the user through the basics of **EduLead** software. It also provides a detailed reference for all of the **EduLead** Material Management functionalities. The User Manual describes all the processes and functionalities regarding various modules and its abilities to conduct the smooth transactions and integrations within the modules.

The software **EduLead** is open-source, easy to use and customize, actively maintained, economical and well supported. Throughout this manual it is assumed that the reader has a working knowledge of about **Material Management** and basic computer skills and knows how to:

- Use keyboard and mouse
- Use web browsers to access the **EduLead** website
- Locate, open and save data files.
- Edit, cut, paste and text.

The Material Management consists of 3 Modules mainly:

1. HR

2. Payroll

3. Performance Based Appraisal System (PBAS)

This User Manual consists of the **HR & Payroll Module** for End User reference and guidance. The manual describes how to use the Standard interface. As mentioned, it contains instructions that the users must follow during the operation and servicing of **EduLead**. Diverting from the workflow as mentioned in the user manual may result in errors and non-functioning of the software **EduLead**. It is advisable that the end users must abide by the instructions as mentioned in the user manual.

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Module 1: Human Resources

The Human Resources (HR) module covers the processes related to the HR department of a company. It maintains a complete employee database including contact information, salary details, attendance, performance evaluation, leaves, and appraisal records.

The most important feature here is processing the payroll by using Payroll Entry to generate Salary Slips. Most countries have complex tax rules stating which expenses the company can make on behalf of its Employees.

There are a set of rules for the company to deduct taxes and social security from employee payroll. EduLead accommodates all types of taxes and their calculation.

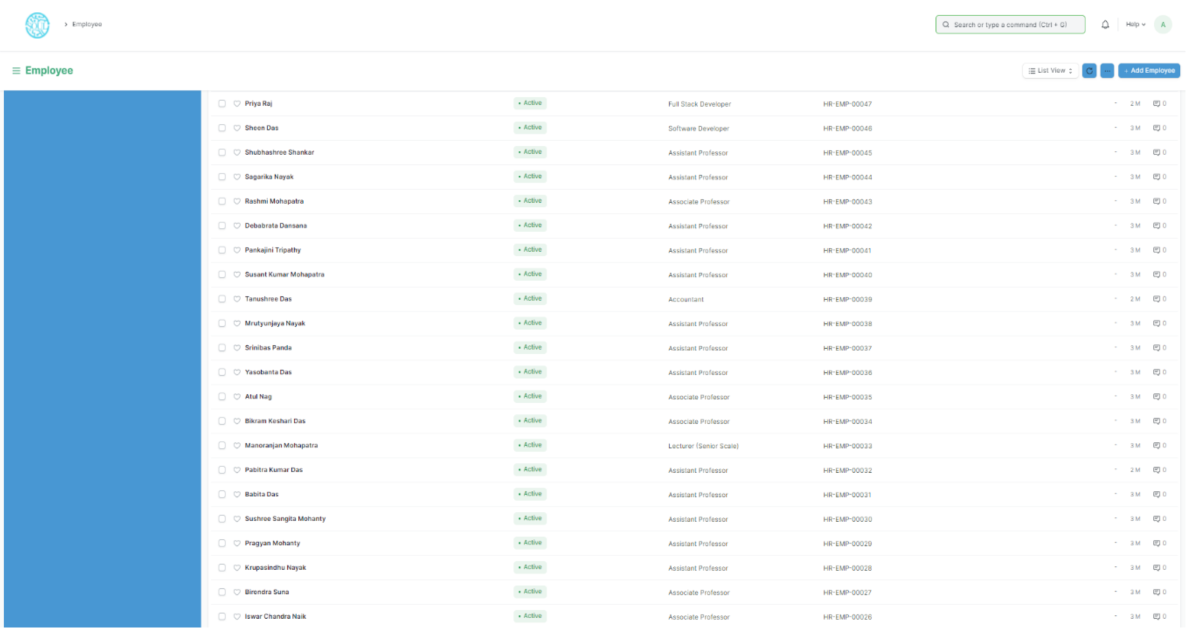
1. Employee

An individual who works part-time or full-time under a contract of employment, and has recognized rights and duties of your company is your Employee.

In EduLead, you can manage the Employee master. It captures the demographic, personal and professional details, joining and leave details, etc. of the Employee.

To access the Employee master, go to:

Home > Human Resources > Employee



1.1 Prerequisites

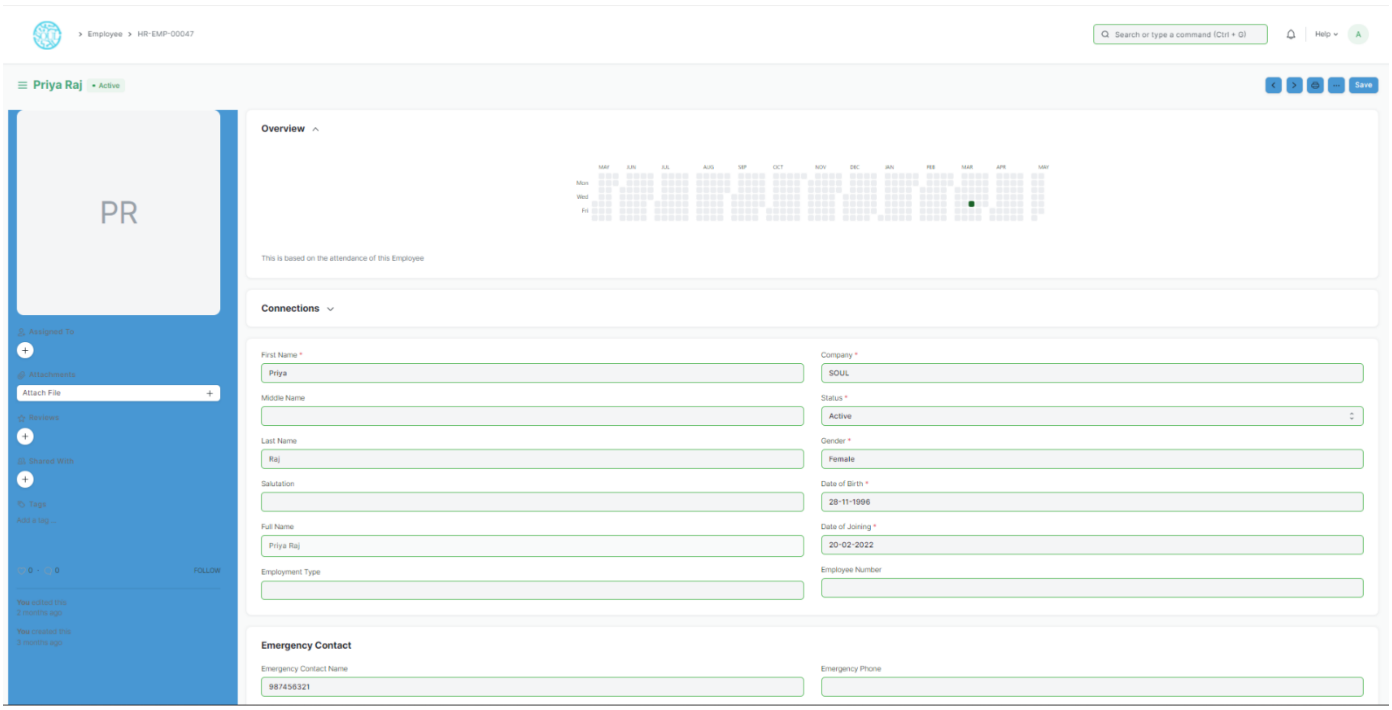
Before creating an Employee, it is advised to create the following:

- Employment Type
- Job Applicant
- Employee Department
- Employee Grade
- Employee Branch
- Employee Designation
- Leave Policy
- Holiday List
- Leave Encashment
- Shift Type
- Employee Health Insurance

1.2 How to create an Employee

1. Go to the Employee list, click on New.
2. Enter the Employee's personal details such as Name, Gender, Date of Birth, and Date of Joining.
3. Save.

As shown below, all the mandatory fields are highlighted.



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1.3 Features

Apart from the aforementioned mandatory details, some additional details that can be captured in the Employee master are as follows:

1.3.1 Employment Type

You can set an Employment Type such as Intern, Contract, Full-time, Part-time, Probation, etc. for an Employee.

1.3.2 Create EduLead User

The User ID can be linked to the Employee. In case the User ID is not created, you can click on 'Create a New User' in the dropdown to create one.

By clicking on the 'Create User Permission' checkbox, the Employee's access to other records can be restricted. Check Adding Users to learn how to create users and add permissions.

1.3.3 Joining Details

The Joining Details of the Employee such as the Offer Date, Confirmation Date, Contract End Date, Notice (Days), and Date of Retirement can be captured.

1.3.4 Department and Grade

In a company, the Employees are usually grouped on the basis of Department, Grade, Designation, and Branch.

In the Department and Grade section, these details of the Employee can be saved. In the 'Reports to' field, the person to whom the Employee has to report his duties to can be captured.

1.3.5 Leave Details

In Leave Details, you can save the Leave Policy and Holiday List details. Leave Policy specifies the type and number of leaves an Employee is entitled to, and Holiday List is a list which contains the dates of holidays and weekly offs.

1.3.6 Salary Details

Here, the mode of salary payment, i.e. through Bank, Cheque or Cash can be selected.

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1.3.7 Contact Details

Employee's Contact information such as Mobile Number, Current and Permanent Address, Personal and Company Email ID can be captured here. In the Preferred Email ID field, either the the Company Email, Personal Email or User ID of the Employee can be selected depending on the user's preference.

1.3.8 Personal Details

Personal Details of the Employee such as Family Background details like name and occupation of parent, spouse and children, Passport Details including date and place of issue, Health Details like height, weight, allergies, medical concerns, etc. can be saved.

1.3.9 Educational Qualification

Here, the Educational Details such as School/University, Qualification, Level and Year of Passing of the Employee can be saved as shown below:

Additionally, details such as Class/Percentage and Subjects can also be saved by clicking on the downward arrow in the Education table.

1.3.10 Previous Work Experience

Just like Educational Qualification, an Employee's Previous Work Experience can also be captured in the External Work History table as shown below:

Additionally, details such as Contact of the previous company and Total Experience in years can also be saved in the External Work History table.

1.3.11 Exit

Exit details of the employee (if any) such as Resignation, Exit Interview and Leave Encashment details can be saved. When the status of the Employee is set to 'Left', it is mandatory to fill the Relieving Date.

Note: Once the Employee status is set to 'Left', that particular Employee master won't be accessible in further transactions.

1.3.12 Additional Features

Some additional features included in the Employee master are as follows:

- Emergency Contact

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- Health Insurance
- Personal Bio
- History in the Company

1.4 Related Topics

1. Leave Management
2. Payroll Management

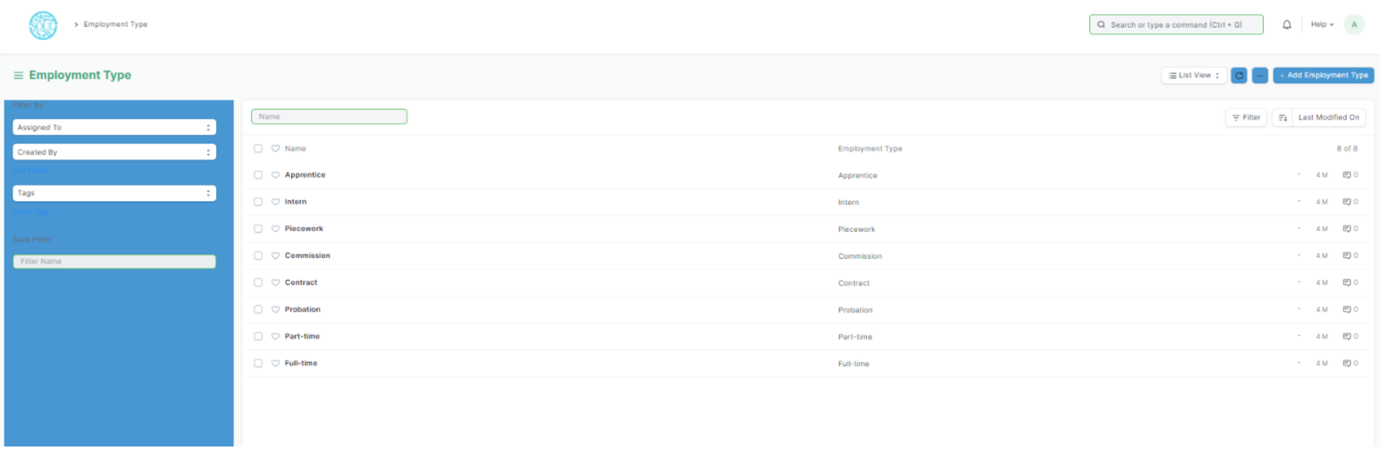
2. Employment Type

You can employ people under a number of categories each having their own wage and leave entitlements. This is called an Employment Type.

EduLead allows you to select an Employment Type from a pre-defined list or even create a new Employment Type based on your requirements.

To access the Employment Type, go to:

Home > Human Resources > Employee > Employment Type



2.1 How to create an Employment Type

1. Go to the Employment Type list, click on New.
2. Enter the Name of the Employment Type.
3. Save.

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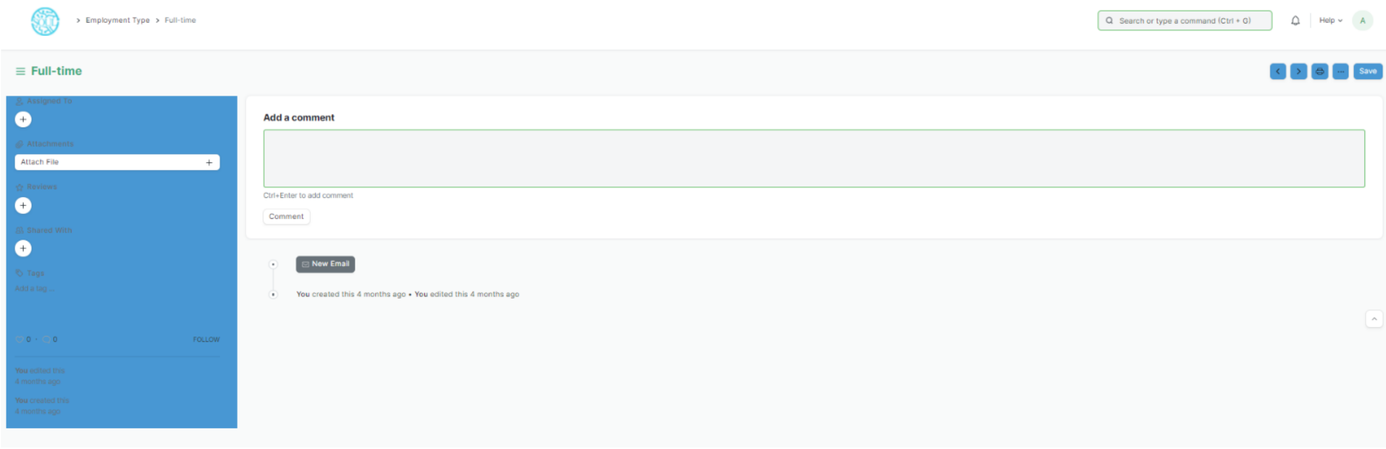


The Employment Type can be linked to the Employee master.

2.2 Related Topics

1. Employee
2. Employment Type
3. Branch
4. Department
5. Designation
6. Employee Grade

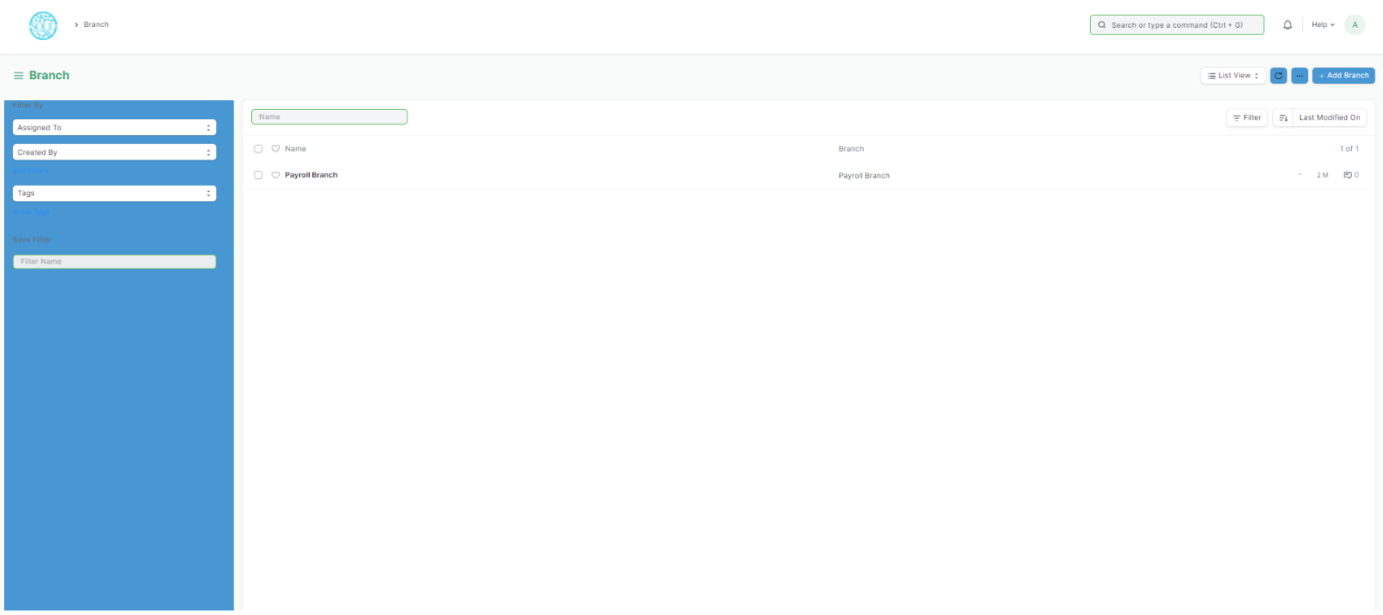
3. Branch

A Branch office is an outlet of a company located at a different location, other than the main office.

EduLead allows you to create and keep a record of the different branches of your organization.

To access Branch, go to:

Home > Human Resources > Employee > Branch



3.1 Prerequisites

Before creating a Branch, it is mandatory you create the following documents:

- Company

3.2 How to create a Branch

1. Go to the Branch list, click on New.
2. Enter the name of the Branch.
3. Save.

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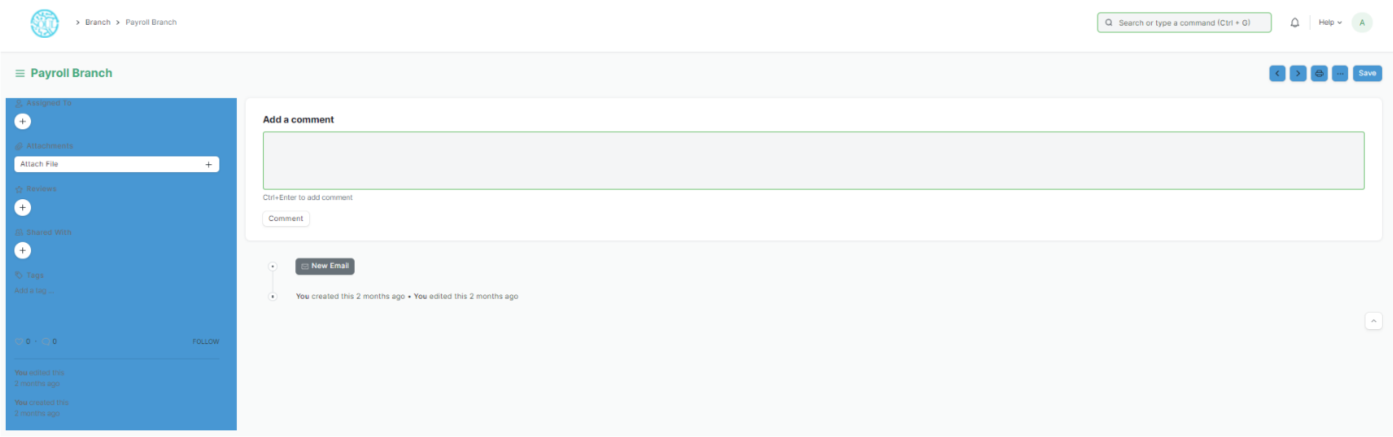

You can link the Branch to the Employee master.

3.3 Related Topics

1. Employee
2. Employment Type
3. Department
4. Designation
5. Employee Grade
6. Employee Group

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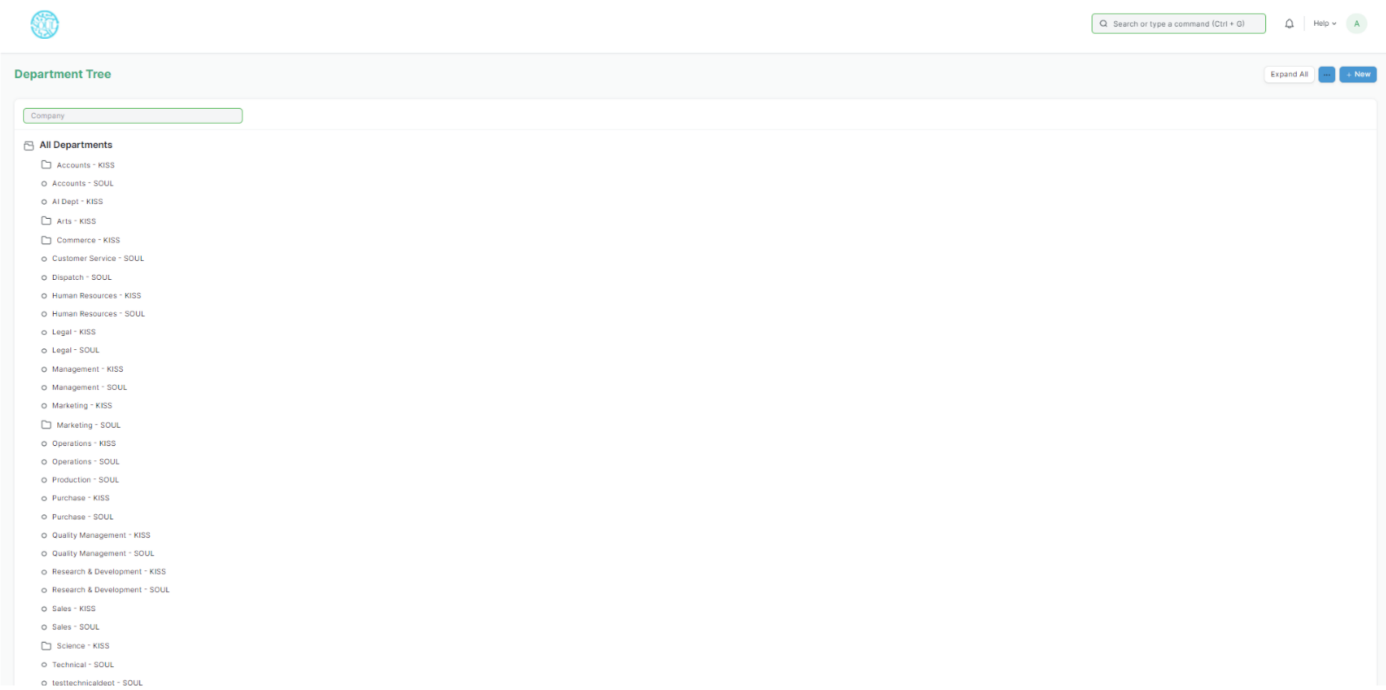
4. Department

A Department is a specialized functional area or a division within an organization.

You can configure the Departments in your organization, set Leave Block List, and also Leave and Expense Approvers for the same.

To access Department, go to:

Home > Human Resources > Employee > Department



Department is a tree-structured master, which means you can create parent departments and sub-departments as shown below:

Note: The 'Is Group' checkbox needs to be checked if the Department is a parent department.

4.1 Prerequisites

Before creating a Department, it is advisable you create the following documents:

- Company
- Leave Block List

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4.2 How to create a Department

1. Go to the Department list, click on New.
2. Enter Department name.
3. Select Company name.
4. Select Leave Block List (optional) applicable for this department.
5. Save.

4.3 Features

4.3.1 Leave and Expense Approvers

You can set Leave and Expense Approvers for a particular Department in the 'Leave Approver' and 'Expense Approver' table respectively.

Note: Multiple Leave and Expense Approvers can be set for a particular Department. However, the first Approver in the list will be set as the default Approver.

4.4 Related Topics

1. Employment Type
2. Employee Grade
3. Employee Branch
4. Employee Designation

5. Designation

Designations are the official job titles given to employees.

With reference to company management, there are various stakeholders like directors, officers, managers and shareholders who guide a company towards the fulfillment of its business objectives.

EduLead allows you to create various designations and also mention the skills required for the same.

To access Designation, go to:

Home > Human Resources > Employee > Designation

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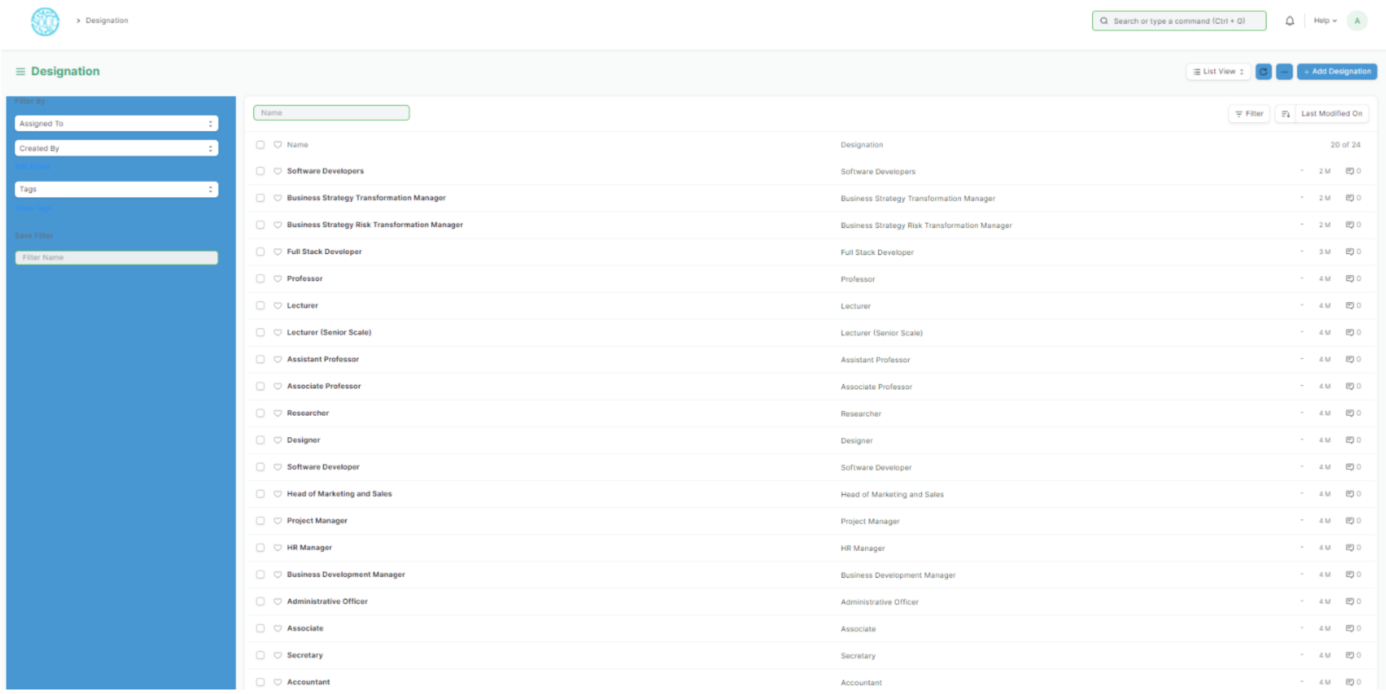
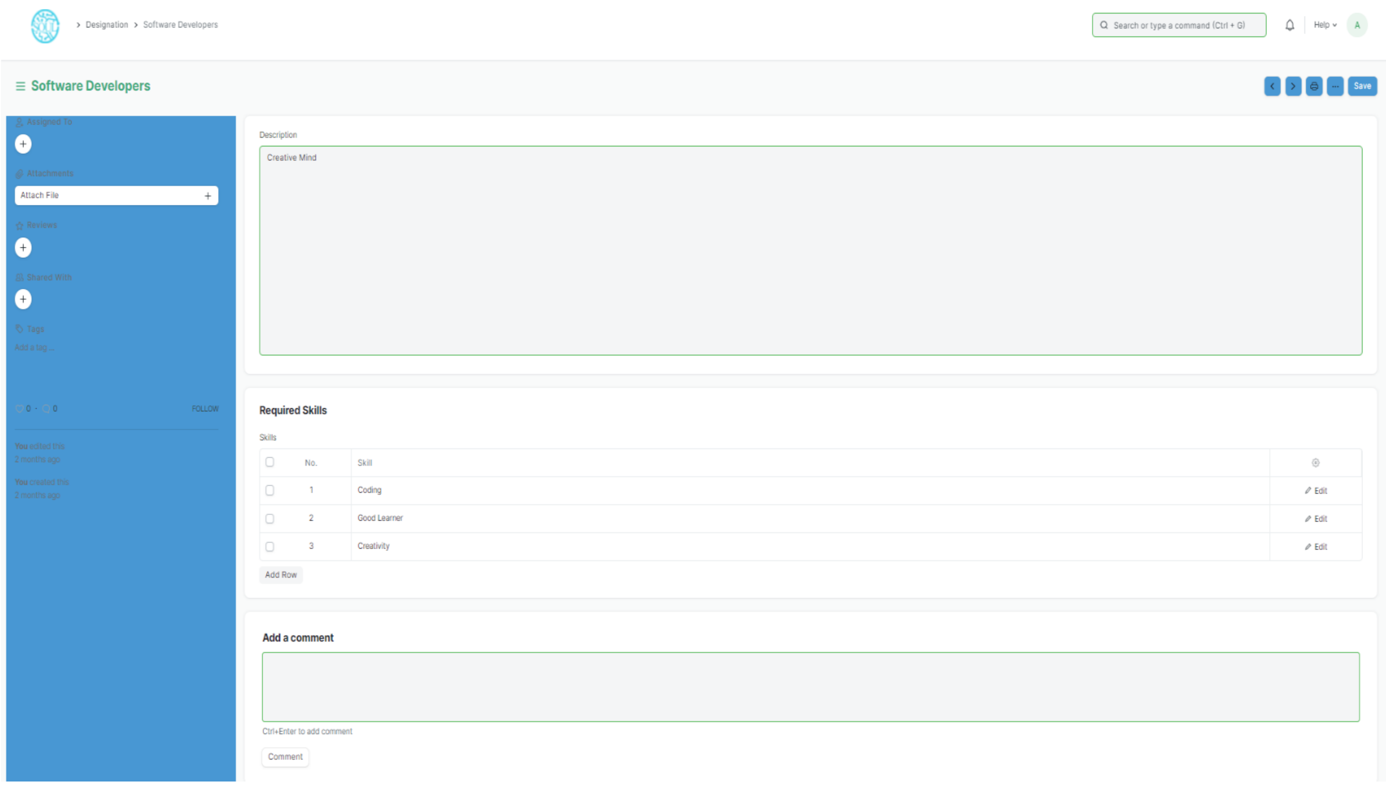


5.1 How to create a Designation

1. Go to Designation list, click on New.
2. Enter the Designation name.
3. Enter Description and Required Skills (optional).
4. Save.



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Note: The skills required for an Employee of a particular Designation that are specified in the "Required Skills" section of the Designation doctype can be directly fetched in the Employee Skill Map to evaluate an employee's performance based on his skills.

5.2 Related Topics

1. Employee
2. Employment Type
3. Branch
4. Department
5. Employee Grade
6. Employee Skill Map

6. Employee Grade

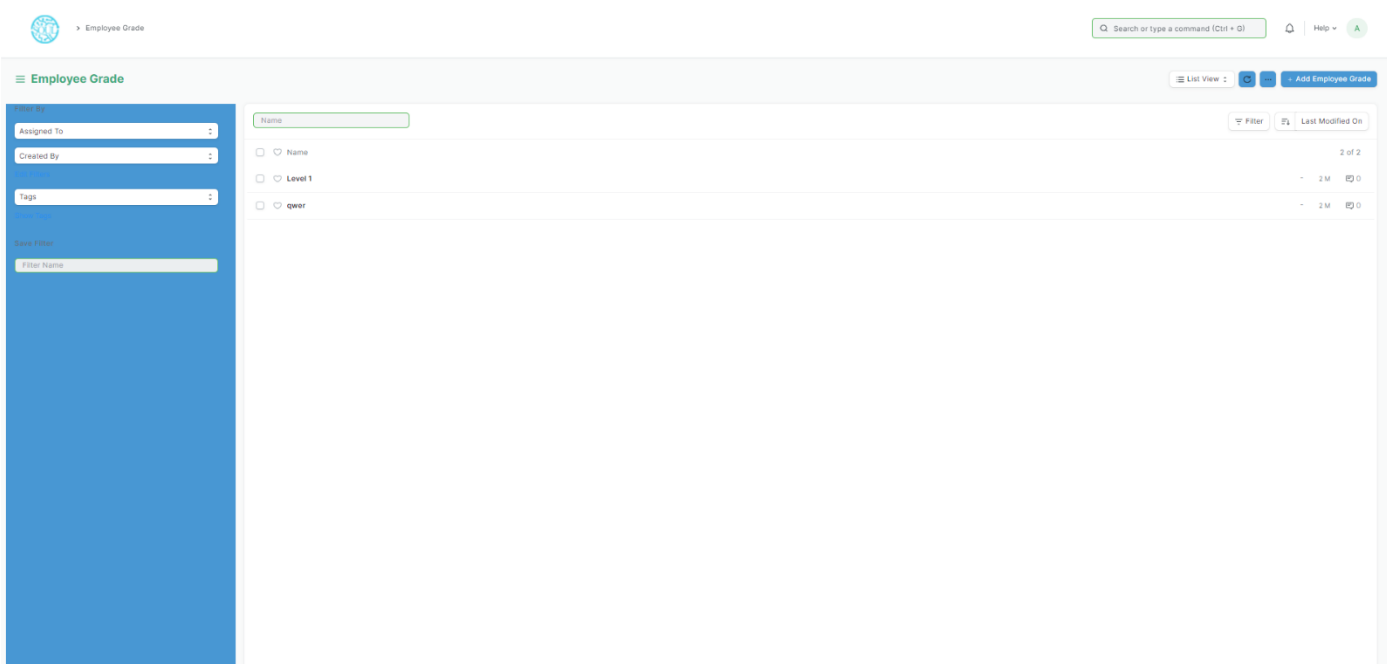
An Employee Grade is a grouping of the employees with similar positions or values in order to assign compensation rates and salary structures.

EduLead allows you to configure Employee Grades, helping you to easily categorize employees based on seniority or any other criteria.

Employee Grade also helps you fetch Employee records in bulk based on their grades while processing payroll, allocating leaves, etc.

To access Employee Grade, go to:

Home > Human Resources > Employee > Employee Grade



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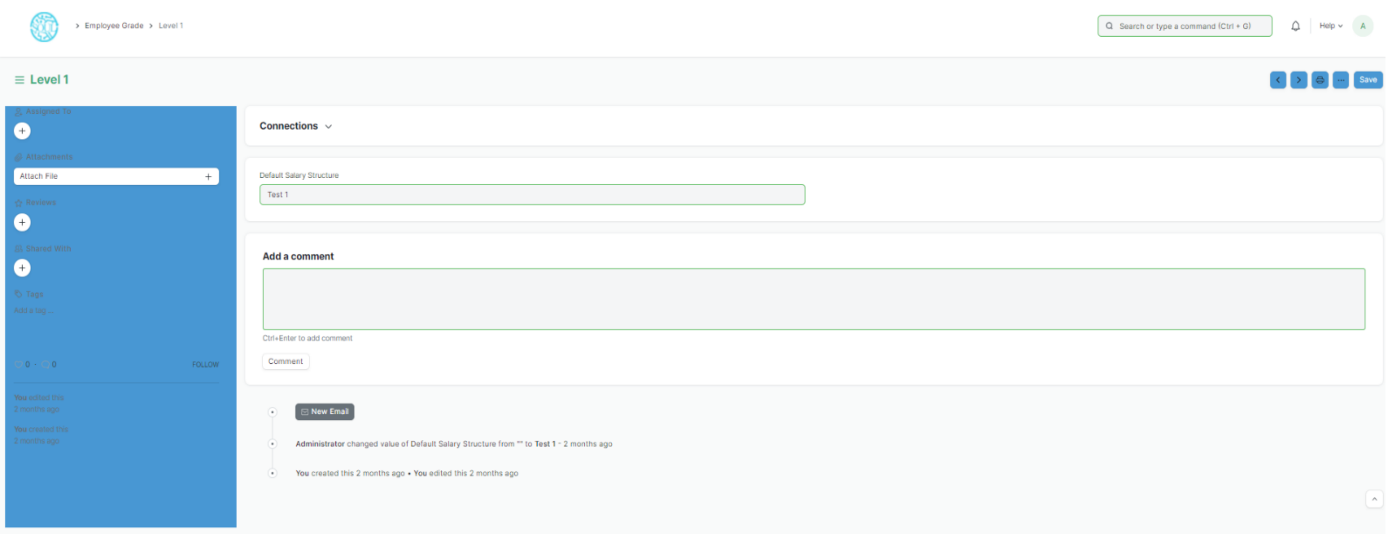
6.1 Prerequisites

Before creating an Employee Grade, it is advisable you create the following documents:

- Leave Policy
- Salary Structure

6.2 How to create an Employee Grade

1. Go to Employee Grade list, click on New.
2. Enter the Name of the Employee Grade.
3. Enter the Default Leave Policy and Default Salary Structure for that Grade.
4. Save.



Shown below are the different Employee Grades created.

You also can access Employee, Leave Period, Employee Onboarding Template and Employee Separation Template.

6.3 Related Topics

1. Leave Type

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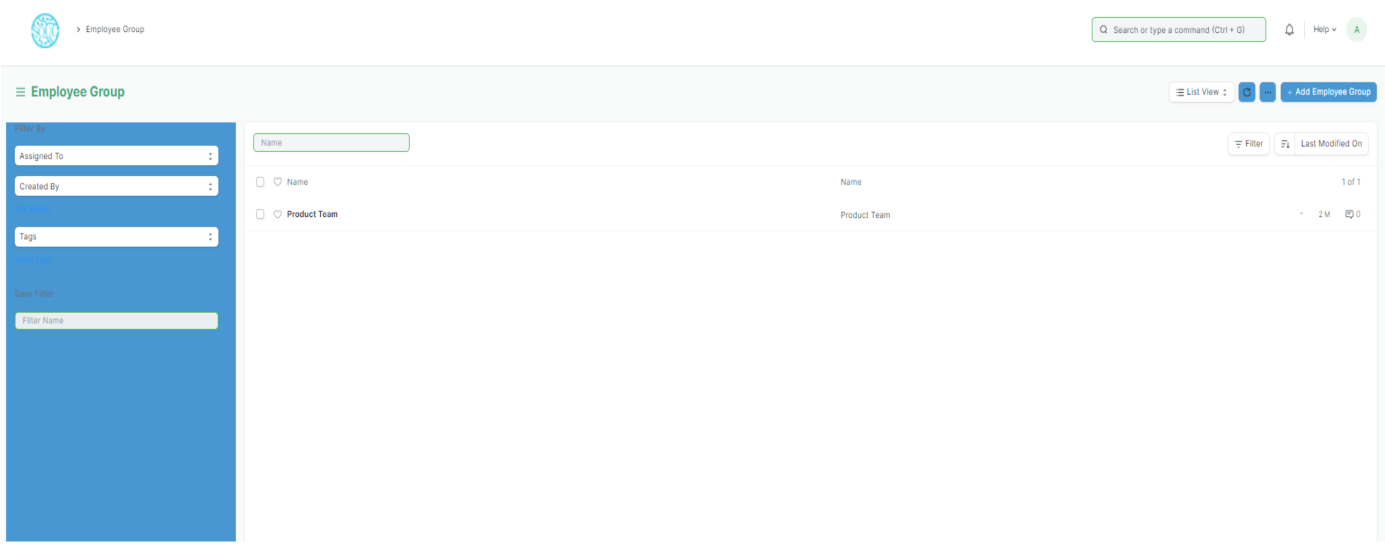
7. Employee Group

Employee Group is grouping of Employees based on some attributes such as Designation, Grade, Branch, etc.

To access Employee Group, go to:

Home > Human Resources > Employee > Employee Group



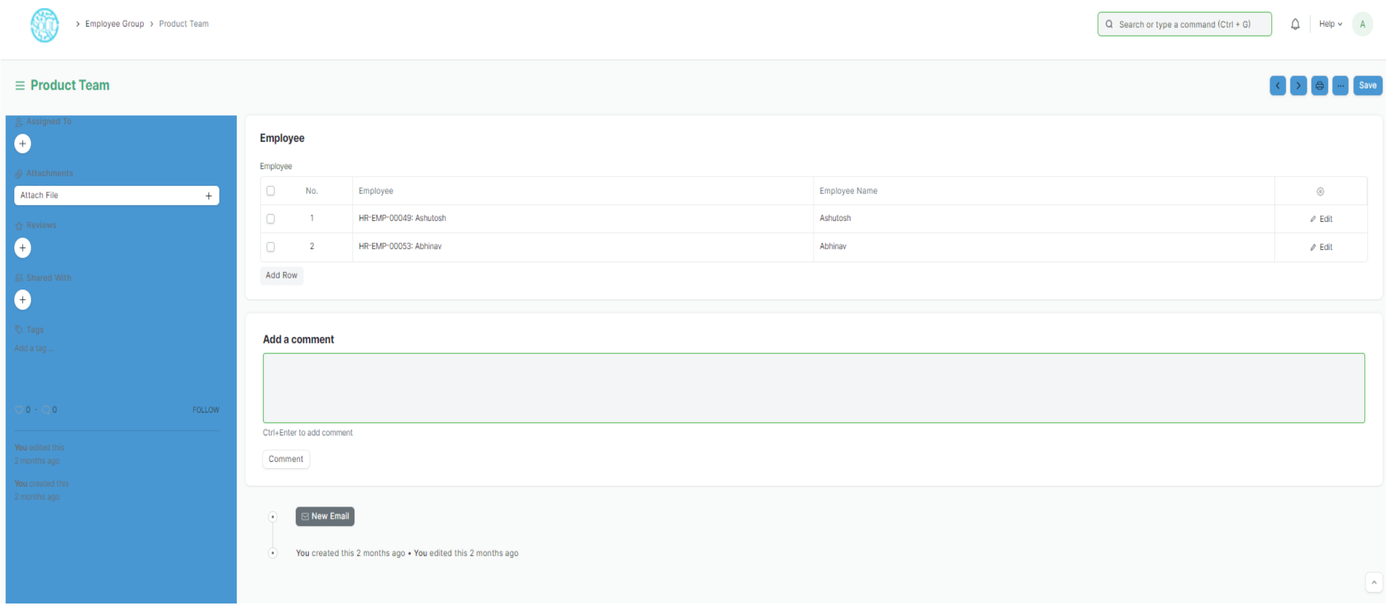
7.1 Prerequisites

Before creating an Employee Group, it is advisable you create the following documents:

- Employee

7.2 How to create an Employee Group

1. Go to Employee Group list, click on New.
2. Enter the Name.
3. Select and add Employee ID to the group. The Employee Name will get automatically fetched.
4. Save.



7.3 Features

7.3.1 Service Level Agreement

An Employee Group can be added to the Service Level Agreement doctype, where the Service Level can be specified for a particular Employee Group.

7.4 Related Topics

1. Employment Type
2. Branch
3. Department
4. Designation
5. Employee Grade

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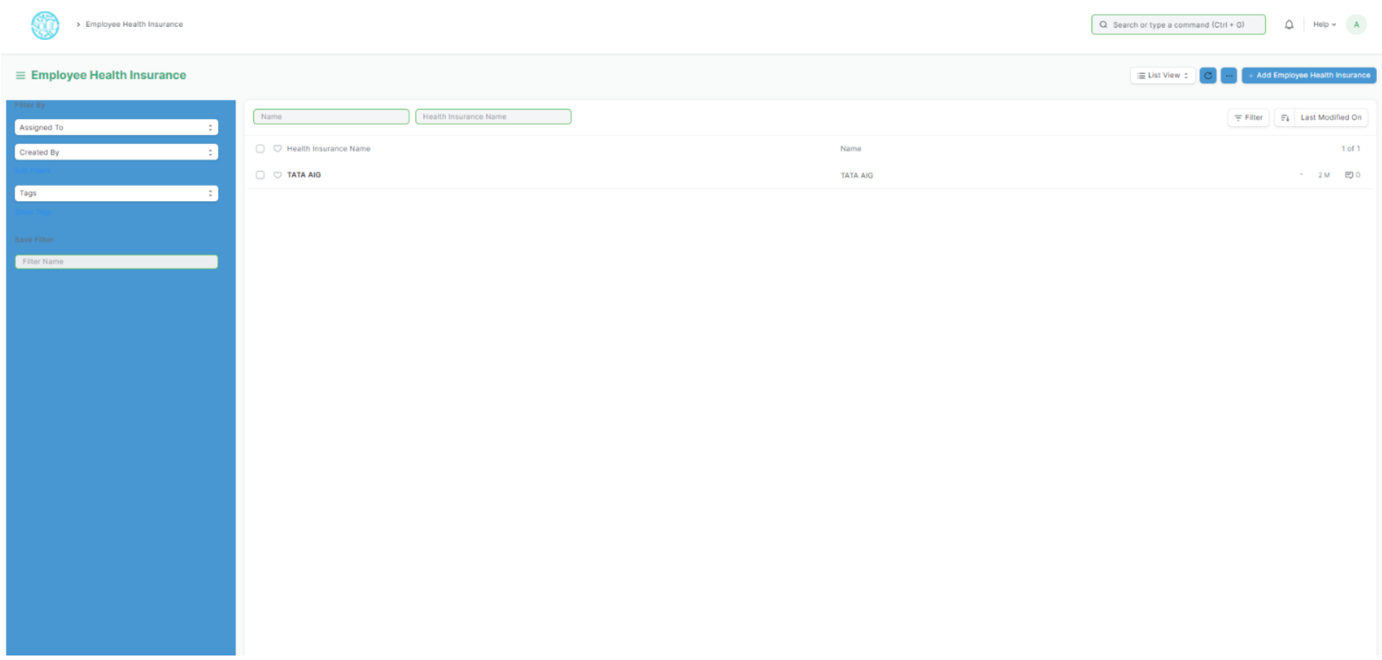
8. Employee Health Insurance

Employee Health Insurance is a benefit extended by the company to their employees. When a company provides health insurance assistance, they pay full or part premiums for the health insurance policy.

EduLead allows you to save the Employee Health Insurance detail and link it to that particular Employee's master.

To access Health Insurance Provider document, go to:

Home > Human Resources > Employee > Employee Health Insurance



8.1 How to create an Employee Health Insurance

1. Go to Employee Health Insurance list, click on New.
2. Enter the Health Insurance Name.
3. Save.

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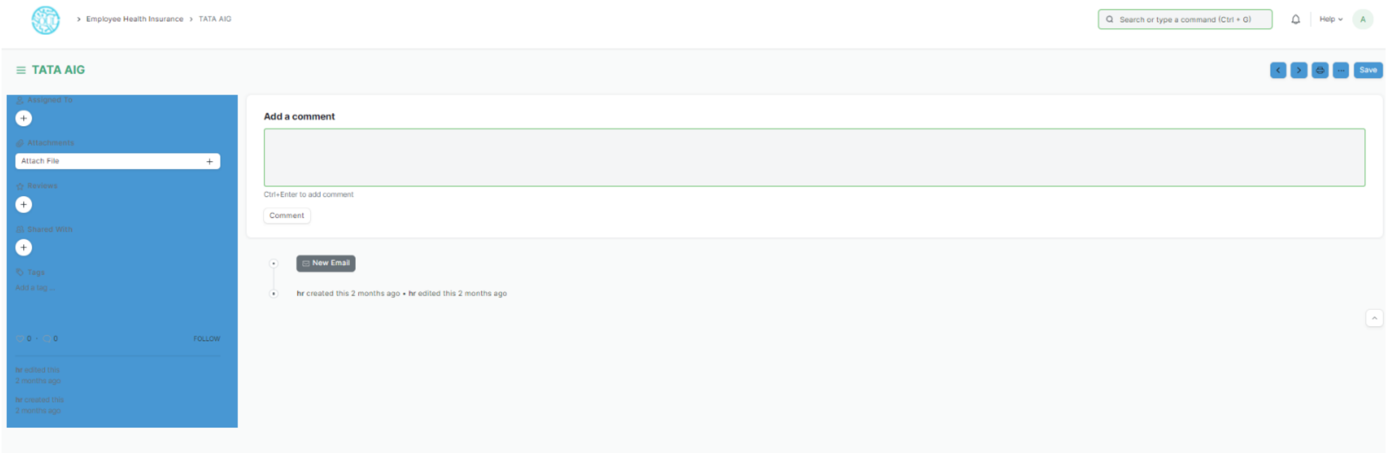

Additionally, in the Employee master, you can attach the Health Insurance Provider Name and fill in the Health Insurance No.

8.2 Related Topics

1. Employee

9. Attendance

Attendance is a record stating whether an Employee has been present on a particular day or not.

In EduLead, you can mark and record attendance of an Employee on a daily basis using the Attendance doctype.

To access Attendance, go to:

Home > Human Resources > Attendance

9.1 Prerequisites

Before creating an Attendance record, it is advised that you create the following first:

- Employee
- Shift Type

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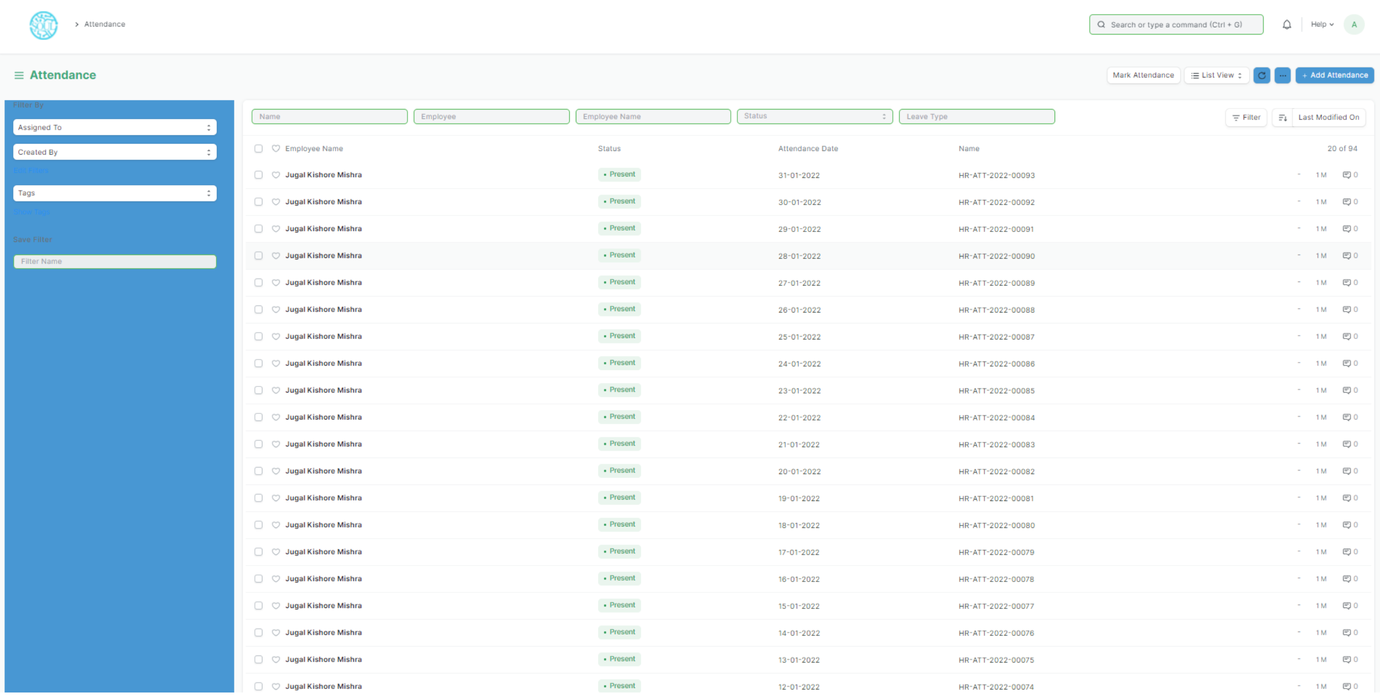
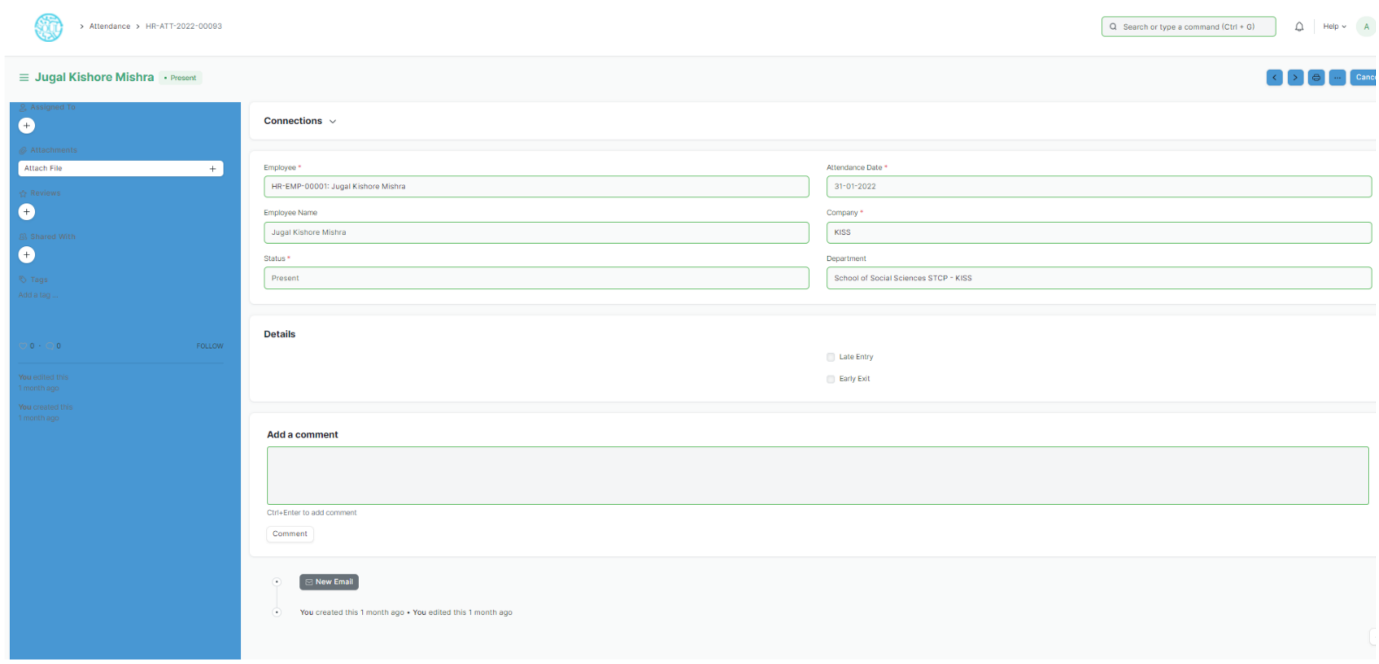


9.2 How to create an Attendance

1. Go to the Attendance list, click on New.
2. Select the Employee.
3. Select the Attendance Date.
4. Select the Shift (optional).
5. Select the Status (Present, Absent, On Leave, Half Day).
6. Save and Submit.



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Note: Attendance cannot be marked for future dates.

You can get a monthly report of your Attendance data by going to the Monthly Attendance Details report.

You can easily set attendance for Employees using the Employee Attendance Tool.

You can also bulk upload attendance using the Upload Attendance.

9.3 Features

9.3.1 Marking Unmarked Attendance

In case the attendance for some employees is not marked, you can mark them as present, absent, or half-day.

How to Mark Attendance

1. Go to the Attendance list.
2. Click on the Mark Attendance button.
3. A dialog will appear.
4. Select the Employee and Month.
5. Select the Status whether Present, Absent, or Half Day.
6. If you want to exclude holidays while doing so, check *Exclude Holidays*.
7. Select the dates on which you want to mark attendance for a selected Employee.
8. Click on the Mark Attendance button and click on Yes.

9.4 Related Topics

1. Employee Attendance Tool
2. Shift Management
3. Auto Attendance
4. Upload Attendance
5. Attendance Request

It is also, possible to set up marking of attendance automatically based on check-in/check-out logs from Biometric/RFID Devices (or any other similar mechanisms that produce IN/OUT logs of the employee). Please refer to Auto Attendance feature for more information.

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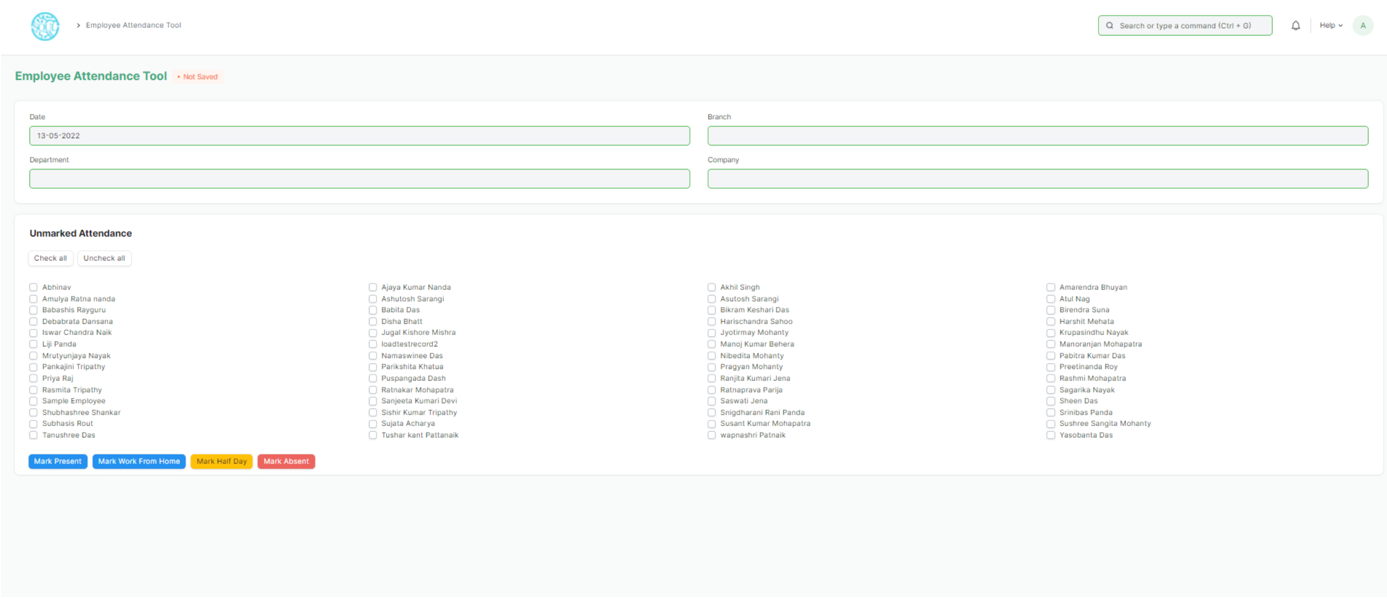
10. Employee Attendance Tool

Employee Attendance Tool allows you to mark attendance of multiple employees for a particular date.

To access the Employee Attendance Tool, go to:

Home > Human Resources > Attendance > Employee Attendance Tool

This tool allows you to add attendance records for multiple employees based on their Department and Branch for a given day quickly.



10.1 Prerequisites

Before creating an Employee Attendance, it is advised that you create the following first:

- Employee
- Department
- Branch

10.2 How to mark attendance using Employee Attendance Tool

1. Enter the Date.
2. Select the Department and Branch (optional).
3. Select the Employees.

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4. Mark Present, Absent or Half Day as required.

Note: Attendance cannot be marked for future dates.
Once the attendance is marked using the Employee Attendance Tool, the employee attendance is saved in the Attendance record as shown:

10.3 Related Topics

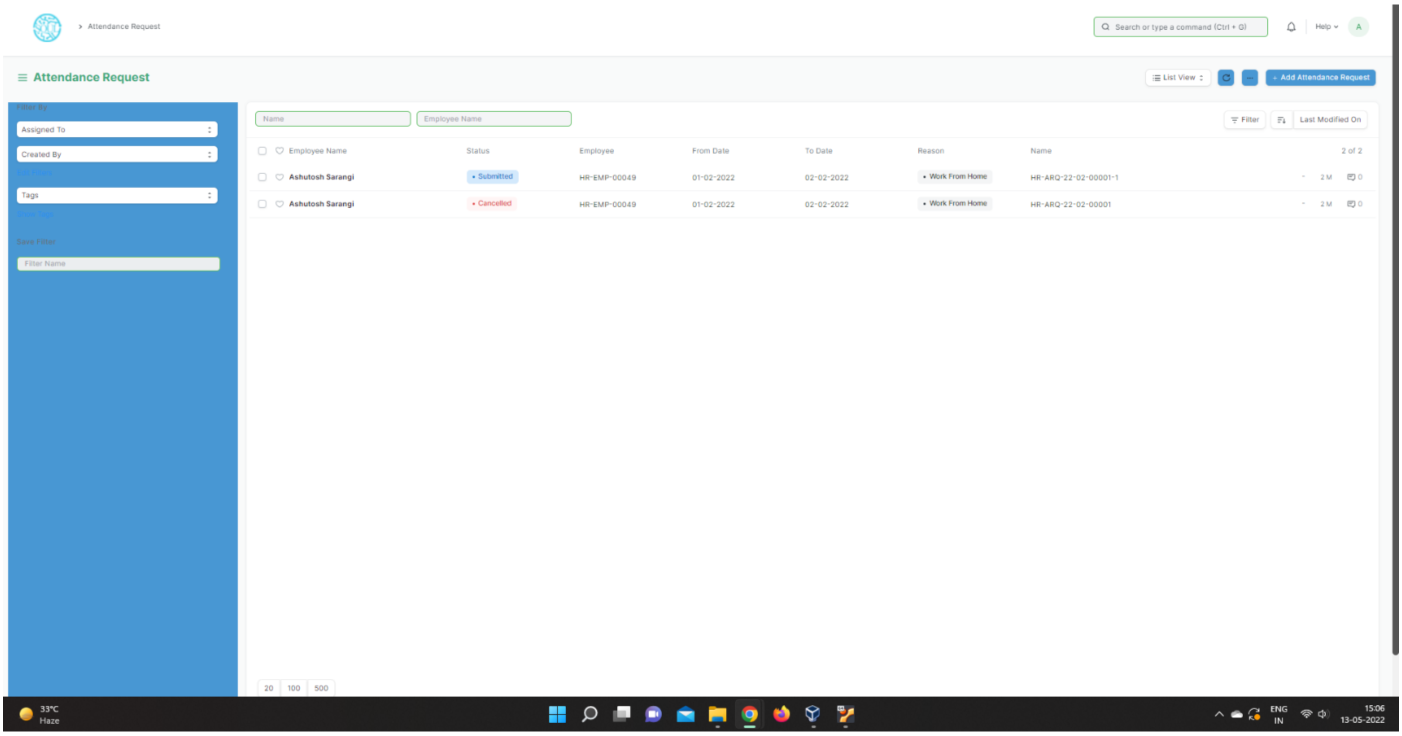
1. Attendance
2. Attendance Request
3. Upload Attendance
4. Shift Management
5. Auto Attendance

11. Attendance Request

Using the Attendance Request, employees can submit their attendance request for the days when their attendance wasn't marked due to various reasons such as on-site duty or work from home.

To access Attendance Request, go to:

Home > Human Resources > Attendance > Attendance Request



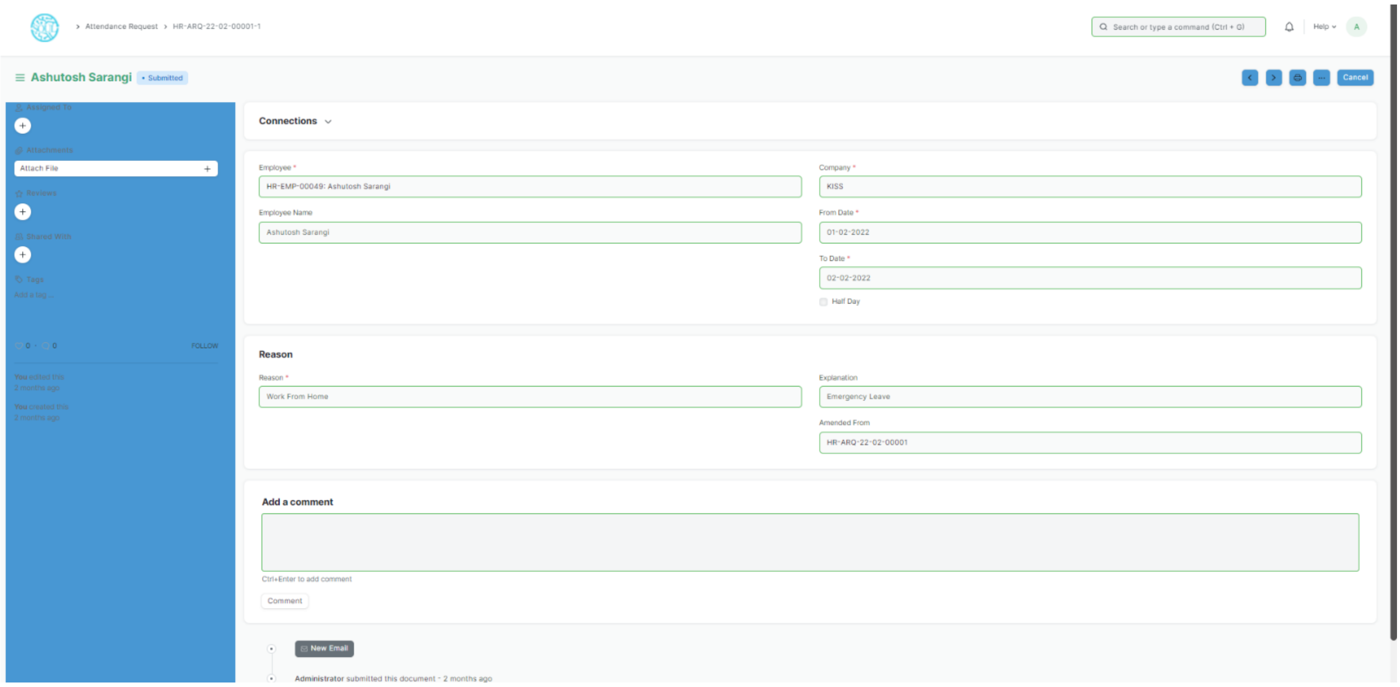
11.1 Prerequisites

Before creating an Attendance Request, it is advised that you create the following first:

- Employee

11.2 How to create an Attendance Request

1. Go to Attendance Request list, click on New.
2. Select Employee who wants to submit the Attendance Request.
3. Select From Date and To Date of Attendance Request.
4. Select Reason and enter Explanation (optional).
5. Save and Submit.



Note 1: You can check the 'Half Day' checkbox and enter the Date in case the attendance is for Half Day.

Note 2: On submission of the same, Attendance documents will be created for the days you mentioned as shown.

Note 3: You can submit Attendance Request of only unmarked Attendance.

As seen below, respective Attendance records are linked with the submitted Attendance Request.

If you cancel the Attendance Request, the linked Attendance documents created will be cancelled as well.

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11.3 Related Topics

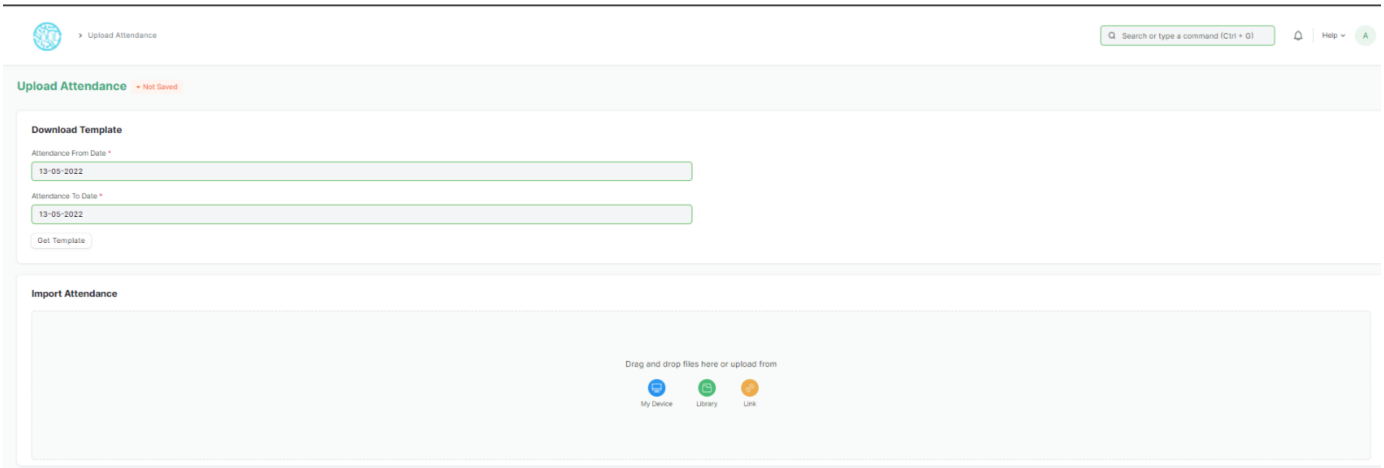
1. Employee Attendance Tool
2. Shift Management
3. Auto Attendance
4. Upload Attendance
5. Attendance

12. Upload Attendance

This tool helps you to upload bulk attendance from a csv file.

To upload the attendance, go to:

Home > Human Resources > Attendance > Upload Attendance



12.1 Prerequisites

Before uploading bulk Attendance record, it is advised that you create the following first:

- Employee

12.2 How to upload attendance in bulk

1. Enter Attendance From Date and Attendance To Date.
2. Click on 'Get Template' button. It will download a csv file with the Employee Details as shown.

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3. Enter the Status (Present / Absent) of the Employee for the selected dates.
4. Save the file.
5. Upload the saved file.

   Once the bulk attendance is uploaded, respective attendance records will be created.

12.3 Related Topics

1. Employee Attendance Tool
2. Shift Management
3. Auto Attendance
4. Attendance Request
5. Attendance

13. Employee Check-in

Employee Check-in is used to keep a log of all the check-ins and check-outs of an employee in the organization. Most organizations use this for attendance, shift management, and working hours calculations.

13.1 Prerequisites

To create an Employee Check-in, you need to first create:

- Employee

If you want shifts to be determined in employee Check-ins and want to process auto-attendance, then you need to create the following documents too:

- Shift Type
- Shift Assignment or set a default shift in Employee master.

13.2 How to create an Employee Check-in

13.2.1 Creating logs manually

To create a new Employee Check-in, go to:

Human Resources > Attendance > Employee Check-in

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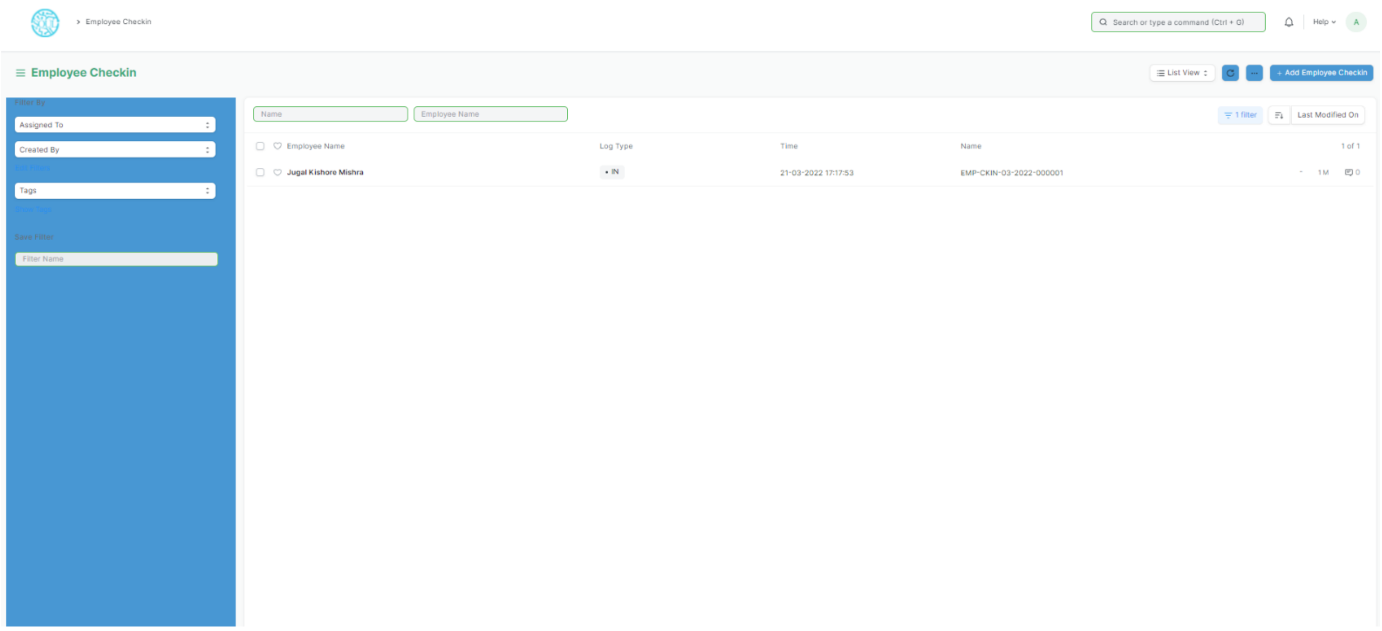
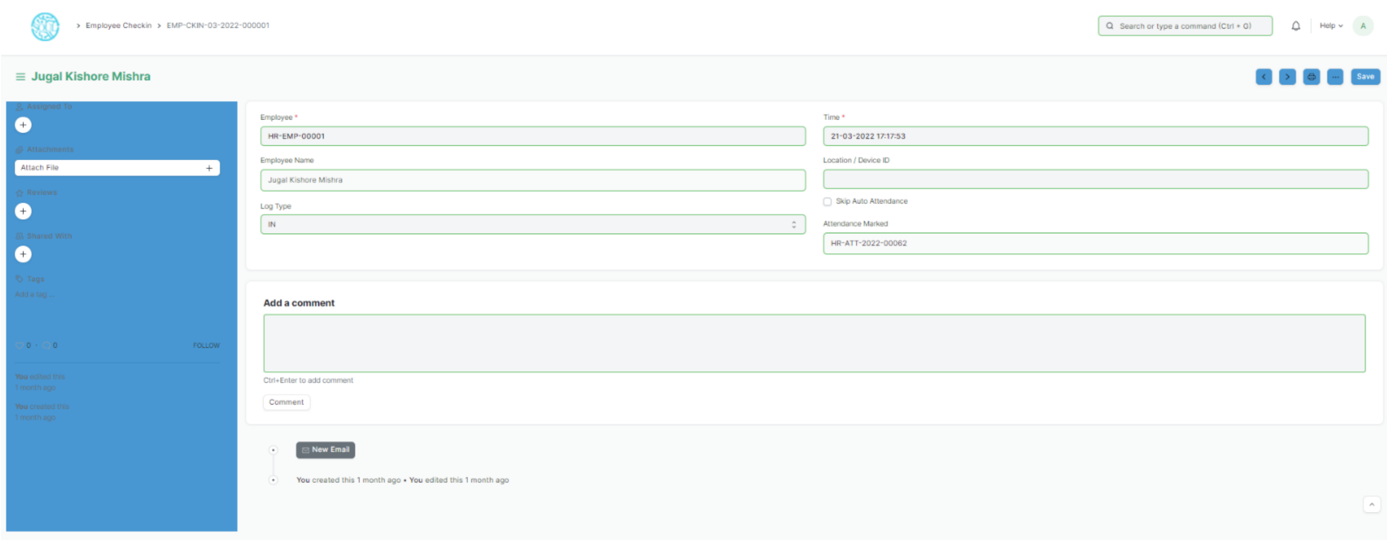


1. Click on New.
2. Select the Employee.
3. Set the date and time for the log.
4. Set Log Type as IN/OUT.
5. Save.
6. If you have set up shifts and shift assignments, the Employee Check-in will set the appropriate shift in which the timestamp falls after saving.
7. You can enable *Skip Auto Attendance* to skip that record while marking attendance.
8. You can also capture the location from where the employee has checked in or the Biometric Device ID.



If auto attendance is enabled, the attendance record marked for a set of check-ins will be linked to the document later.

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13.2.2 Integrating EduLead with Biometric devices

If you are using a Biometric Device to log employee check-ins and check-outs you can use it to create records in EduLead. You can read more about this here.

14. Auto Attendance

Auto attendance marks the attendance for employees assigned to a shift based on the records in the Employee Check-in document and the Auto Attendance Settings of that shift.

Note: Shift Type needs to be set up and assigned to employees before creating 'Employee Check-in' records. Attendance will be marked by Auto Attendance only for check-in records that are created after setting up and assigning an employee to their shift type.

Steps to Set Up Auto Attendance

You can set up Auto Attendance by following the steps mentioned below:

1. Define Shift Type with Auto Attendance Enabled

You will have to define a Shift Type with Auto Attendance enabled. Details can be found here.

2. Assign these shifts to employees

Once you have set up a shift, you will have to assign this shift to the employees. You can assign this to an employee using one of the two methods given below:

- Using the Shift Assignment: You can use the Shift Assignment document to assign shifts to employees on a date to date basis.
- Using the Default Shift field in the employee master: Sometimes you would want to assign a shift for an employee for all the days. You can do this by setting the following field in the Employee: > Employee > Attendance and Leave Details > Default Shift

Note: Setting Shift Assignment takes precedence over the Default Shift. i.e. if you have set up a shift assignment as well as a default shift for an employee, the system will consider the assigned shift over a default shift.

3. Setup Attendance Device ID field in Employee

Biometric systems usually have their own IDs for employees. But, the Employee Check-in in EduLead needs to be mapped to an employee.

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To map the employee to their IDs in the Biometric system you need to set the following field with the appropriate value: Employee > Attendance and Leave Details > Attendance Device ID (Biometric/RF tag ID)

4. Import or sync Employee Check-ins

Once you are done with the above steps you can import/sync the Employee Check-in and start generating attendance automatically.

Please refer to this article to know more about populating Employee Check-ins from an external system: Integrating EduLead with Biometric Attendance Devices

Frequently Asked Questions

1. How are a shift's actual start and end timings determined?

Consider a Morning Shift:

- Start Time: 08:00:00
- End Time: 11:30:00
- Begin check-in before shift start time (in minutes): 60
- Allow check-out after shift end time (in minutes): 60

So the "Actual Start Time" of the shift = *Start Time - Begin check-in before shift start time* = 07:00:00

The "Actual End Time" of the shift = *End Time + Allow check-out after shift end time* = 12:30:00.

2. When is the attendance marked automatically for a particular shift?

Auto Attendance for every 'Shift Type' record is attempted to be marked every hour. You can also trigger the auto attendance manually for a single shift type by pressing the 'Mark Auto Attendance' button in the Shift Type document.

Once the "Last Sync of Check-in" passes the shift's actual end time, all the employee Check-ins for that shift are processed for marking attendance.

For eg: Consider a Morning Shift:

- Start Time: 08:00:00
- End Time: 11:30:00
- Begin check-in before shift start time (in minutes): 60
- Allow check-out after shift end time (in minutes): 60

So the "Actual Start Time" of the shift is 07:00:00 and the actual end time of the shift is 12:30:00.

Once the "Last Sync of Check-in" timestamp passes 12:30:00, it indicates that all possible Check-in records for that particular shift have been synced/captured and this is when attendance marking is attempted.

3. How does Auto Attendance determine shift for an Employee?

The shift of an Employee on a particular date is determined by the following steps:

- Shift assigned to an Employee on the given date in the 'Shift Assignment' document.
- If the above is not found, the shift is picked up from the 'Default Shift' field of the 'Employee' document.
- Finally, if a shift is not found in 'Employee' document also, then it is assumed that the Employee does not belong to any shift on the given date and no attendance is attempted to be marked by the Auto Attendance job.

4. How does Auto Attendance determine Holiday List for an Employee?

Holiday List for an employee is determined as follows:

- If the employee's determined 'Shift Type' has a holiday list, then this is considered.
- Otherwise, the holiday list is fetched from either the 'Holiday List' field in the Employee document or from the 'Default Holiday List' field in the Company document, in that order.

Note: The Holiday List is important to be determined correctly by the Auto Attendance to not mark the employee as 'Absent' on holidays.

5. Most Biometric devices don't return the exact Log Type. In such cases how will the auto attendance determine which log is IN/OUT and how does it calculate working hours?

This is determined by 2 fields in the Shift Type set up:

- Determine Check-in and Check-out
- Working Hours Calculation Based On

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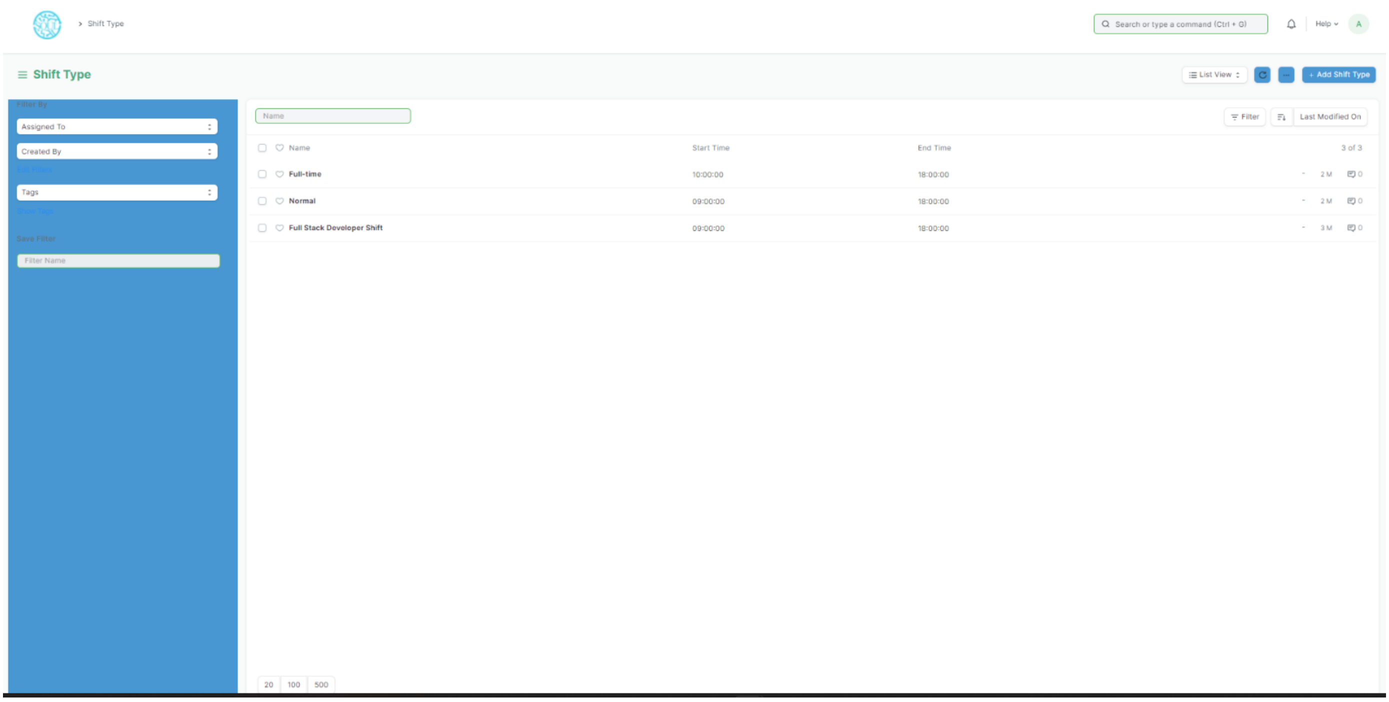
15. Shift Type

The Shift Type document allows you to define the different types of Shifts in your Organization and set up auto attendance for the shift. Auto attendance marks attendance based on Employee Check-in records for employees assigned to a shift.

To access Shift Type, go to:

Home > Human Resources > Shift Management > Shift Type



1. Click on New.
2. Enter the Shift Name, Start Time and End Time
3. Save

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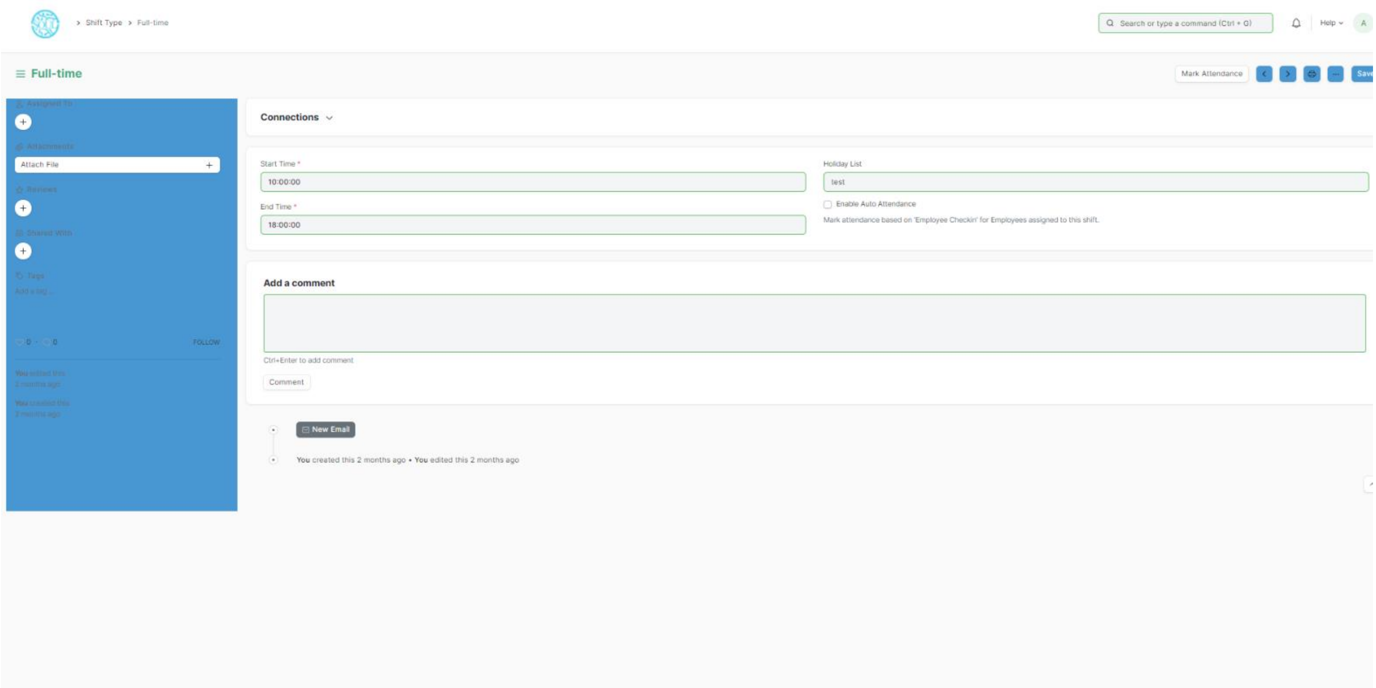

In addition to defining the different shifts in your organization, the Shift Type document also has settings for auto attendance. Auto attendance marks the attendance for the employees assigned to this shift based on records in the 'Employee Check-in' Document. Auto Attendance for all shift type records is attempted to be marked every hour. You can also trigger the auto attendance manually for a single shift type by pressing the 'Mark Attendance' button in the shift type document.

1. Basic Set Up

1. Start Time: The time of the day when this shift starts. The time is to be entered in a 24Hrs format.
2. End Time: The time of the day when this shift ends. The time is to be entered in a 24Hrs format.
3. Holiday List: The applicable holidays for this shift can be selected here. If left blank, the default holiday list from the employee master or the company document is taken into account. Attendance is not marked via the scheduler if it's a holiday.
4. Enable Auto Attendance: You can use this option to enable marking attendance for the employees assigned to this shift based on their Employee Check-in records.

Note: For cases where the 'End Time' is less than 'Start Time', the shift is assumed to be a night shift that starts on one calendar date and ends on the next calendar date.

2. Auto Attendance Settings

You can use the following settings to configure the Auto Attendance as per your requirements:

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- Determine Check-in and Check-out: This setting determines how your check-in logs should be interpreted by the auto attendance system.
    1. Alternating entries as IN and OUT during the same shift: The first entry is taken as IN followed by the next entry as OUT and the following entry as IN and so on. Employee Check-in may not always have an IN/OUT log type. Not all biometric devices return Log Type for every log. For such scenarios you can use this option.
    2. Strictly based on Log Type in Employee Check-in: The check-in is determined as IN or OUT strictly based on the 'Log Type' in the Employee Check-in record. This should be used when the logs that are being recorded in EduLead have the exact log type.
- Working Hours Calculation Based On: Working hours can be calculated either by including the breaks in between the shift or by excluding the breaks. This can be configured using the following options:
    1. First Check-in and Last Check-out:
        - Use this option when you want to include breaks or all out/in entries in your working hours.
        - Selecting this option calculates the working hours by considering the first IN and last OUT Employee Check-in during the shift. The time difference between the two is considered as the actual working hours.
        - In case the IN/OUT is determined by alternating entries then the first Employee Check-in is considered as IN and the last Employee Check-in is considered as OUT for the purpose of calculating working hours.
    2. Every Valid Check-in and Check-out:
        - Selecting this option excludes the time during which the Employee is checked out.
        - i.e. Only the time during which the employee is checked in is calculated as working hours.
- Begin check-in before shift start time (in minutes): Often employees would check-in a few minutes before the shift start time. To consider these check-ins as part of the shift during the calculation of working hours and marking attendance, you can set up this value accordingly.
- Allow check-out after shift end time (in minutes): Often employees would check-out after the shift end time. To consider these check-outs as part of the shift during the calculation of attendance, you can set up this value accordingly.
- Working Hours Threshold for Half Day: If the actual number of working hours is less than the given value in this field then the employee attendance is marked as 'Half Day'. If you never want to mark Half Day based on working hours, you should set this value to zero.

- Working Hours Threshold for Absent: If the actual number of working hours is less than the given value in this field then the employee attendance is marked as 'Absent'. If you never want to mark Absent based on working hours, you should set this value to zero.
- Process Attendance After: The date from which 'Auto Attendance' should start marking attendance. You should set it to a date after which you have Employee Check-in records for this shift.
- Last Sync of Check-in: This is the timestamp up to which Employee Check-in records have been synced. This field has to be updated by the script/person(in case of manual entry) making the Employee Check-in Records. If your logs are automatically pushed to EduLead using the sync tool, this timestamp will automatically be updated for you. You should set this to a date and time up to which the Employee Check-in has been synced.

16. Shift Request

Shift Request is used by an employee to request for a particular Shift Type.

16.1 Prerequisites

To create a Shift Request, these need to be created first:

- Employee
- Shift Type

16.2 How to create a Shift Request

To create a new Shift Request, go to:

Human Resources > Shift Management > Shift Request

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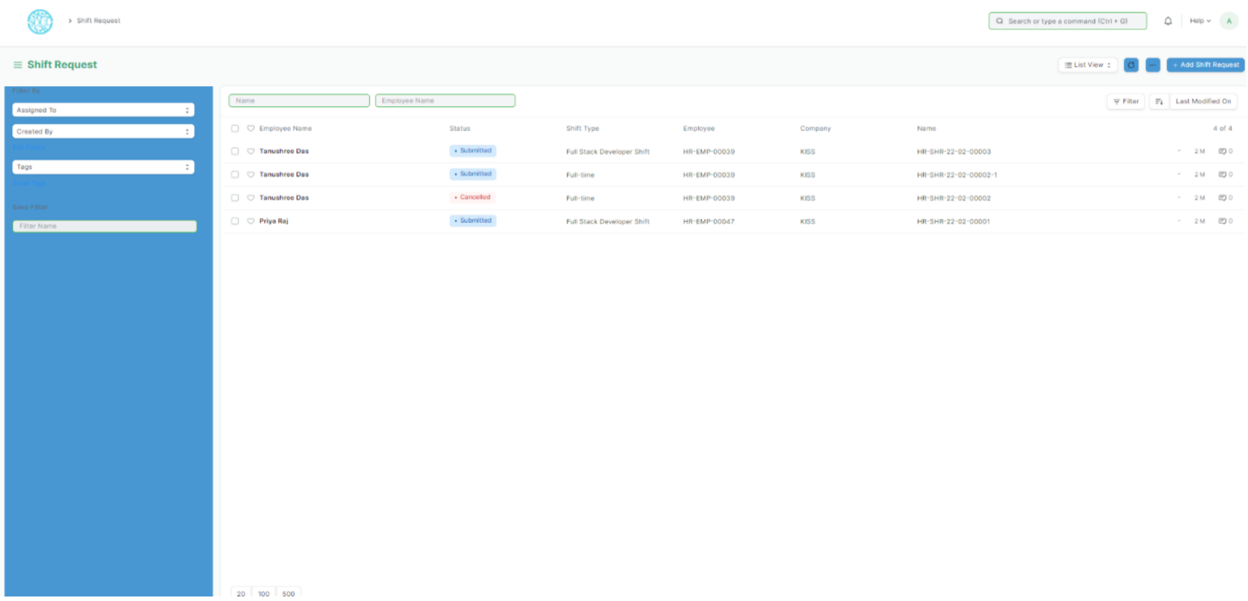
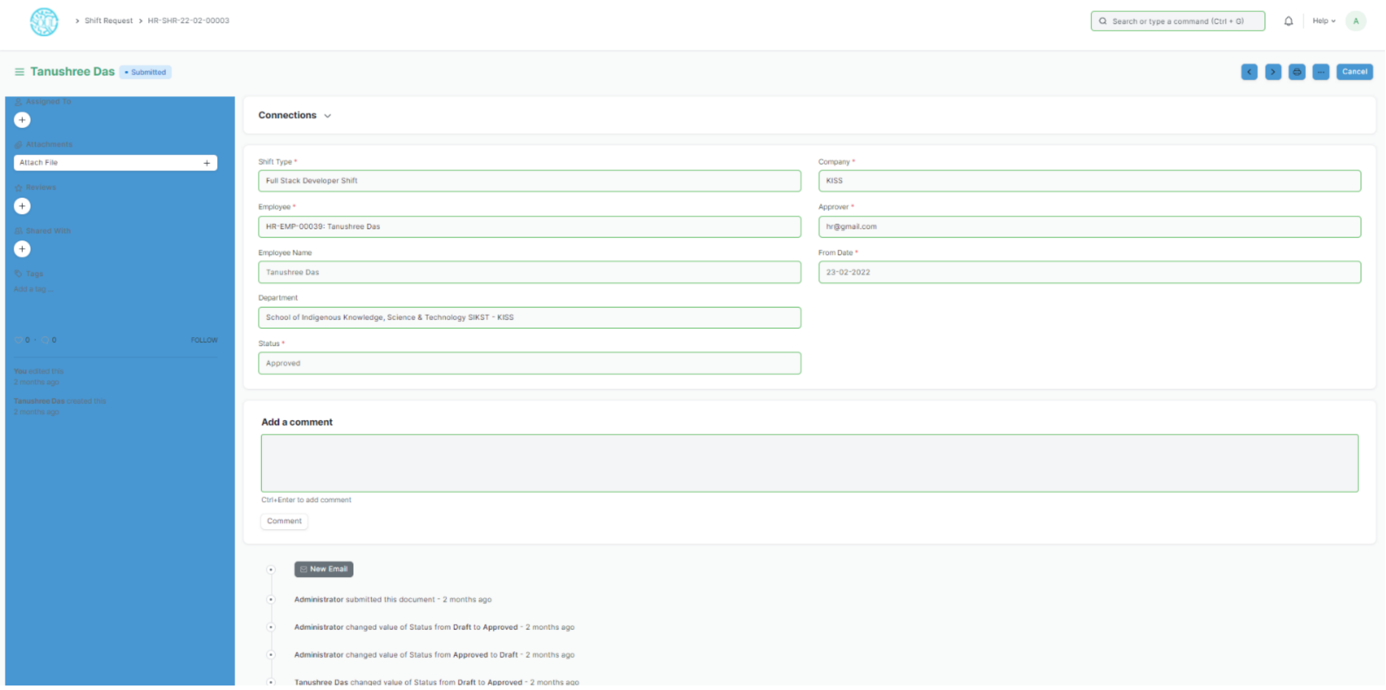


1. Go to Shift Request List, Click on New.
2. Select Employee and Shift Type.
3. Set the Shift duration using From Date and To Date.
4. Select the Approver. If the selected approver does not have access to the Shift Request document, it is shared with the approver with "submit" permission.
5. Save.
6. Once the Shift Request is Approved and submitted, it creates a Shift Assignment



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16.3 Setting Shift Request Approver

A Shift Request Approver is a user who can approve a Shift Request of an Employee. In EduLead version 13, Shift Request Approver can be set at two levels:

- Department Level: Shift Request Approvers for each department can be configured in the Department master. Multiple Shift Request Approver can be set in a Department.

  When an Employee belonging to a particular department request for Shift Type, the Shift Request Approver set in that Employee's department master will be considered as his Shift Type Approvers.
- Employee Level: Shift Request Approver can also be set in the employee master.

If Shift Request Approver are set at both employee and department level, the employee level Shift Request Approver will be considered as the default Leave Approver in this case.

17. Shift Assignment

A Shift Assignment is created to assign a particular shift type to an employee for a specific period.

1. Prerequisites

To create a Shift Assignment, these need to be created first:

- Employee
- Shift Type

2. How to create a Shift Assignment

In some organizations, shifts are assigned to employees, and in some, employees request for a shift. In the latter case, employees can create a Shift Request. Once the Shift Request is Approved and submitted it automatically creates a Shift Assignments for an Employee.

To directly create a Shift Assignment, go to:

Home > Human Resources > Shift Management > Shift Assignment

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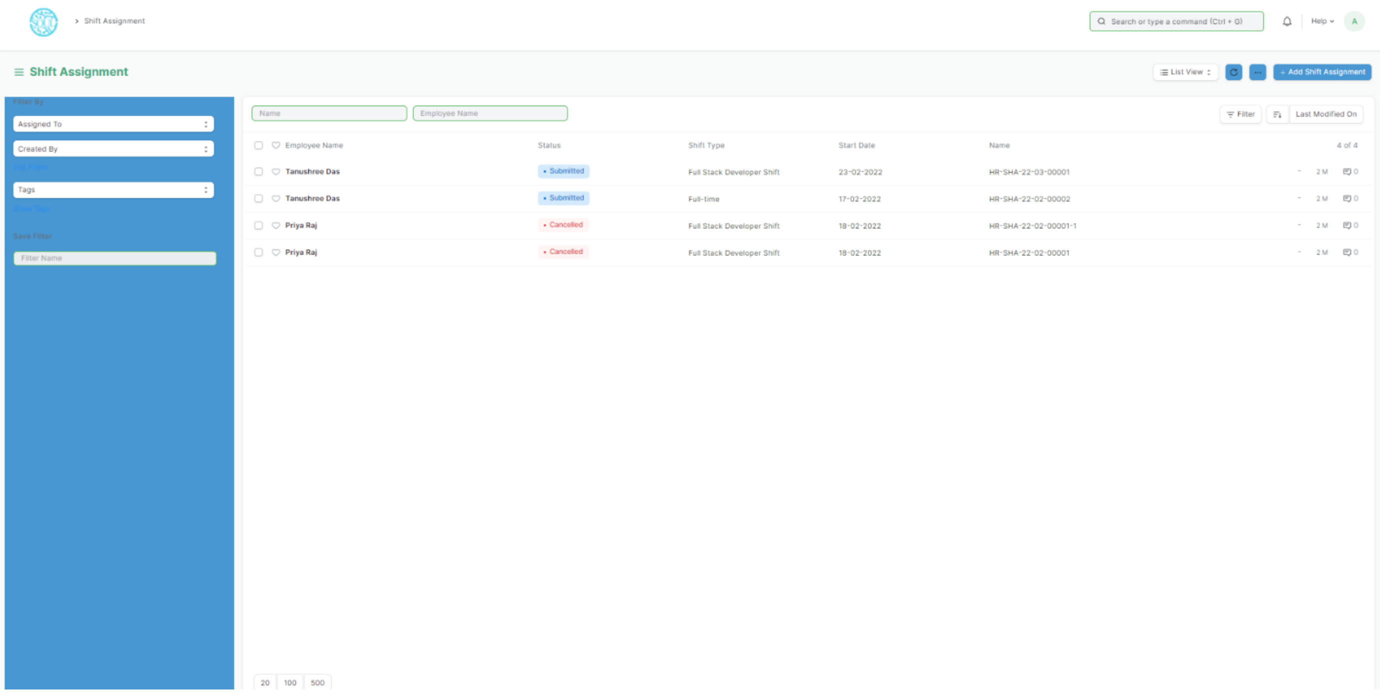
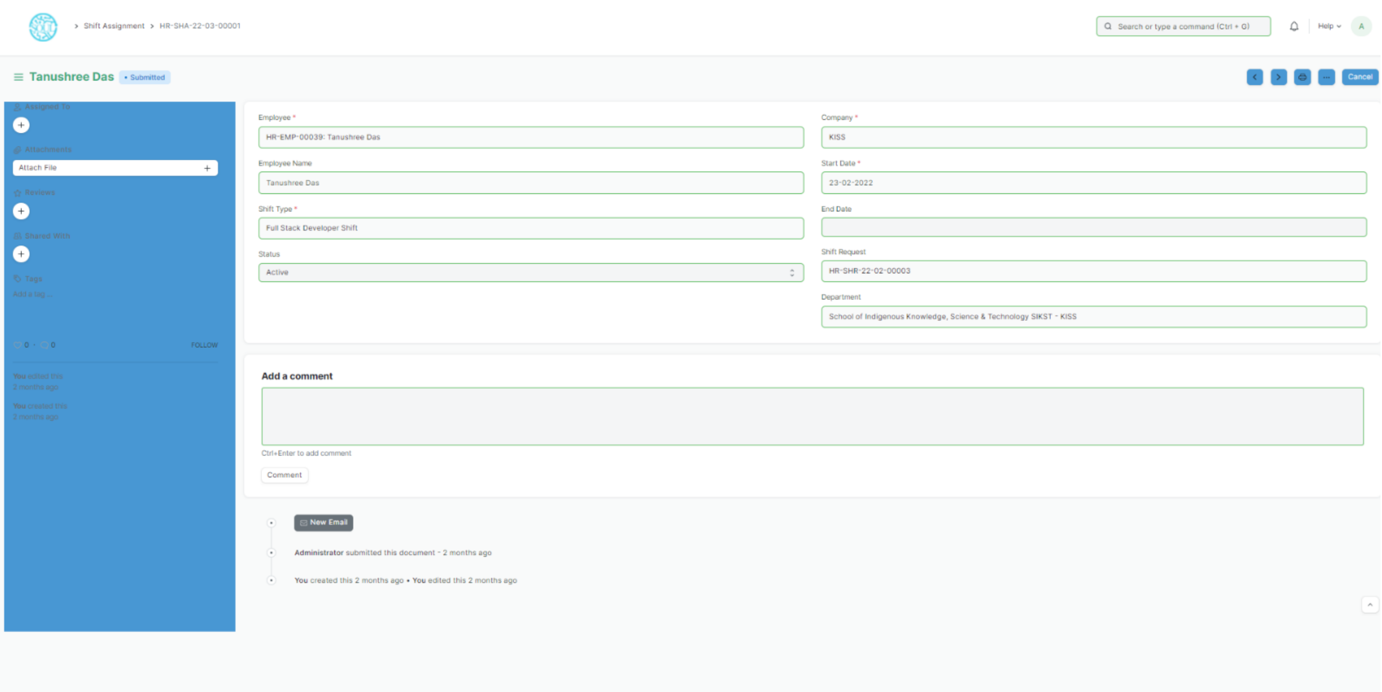


- Click on New
- Select the Employee
- Select the Shift Type
- Set the Start Date. If you want to assign this shift for a specific period, set an End Date.
- Save and Submit.
- You can set the Assignment as Inactive after submission too.



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Note: The Assignment for active shift-type will be for a fixed period if there is an End Date otherwise, it will be treated as an ongoing shift with no End Date. Users can update the End Date and status even after submitting the document.

18. Leaves

This section will help you understand how EduLead enables you to efficiently manage the leave schedule of your organization. It also explains how employees can apply for leaves.

The number and type of leaves an Employee can apply is controlled by Leave Allocation. You can create Leave Allocation for a Leave Period based on the Company's Leave Policy. You can also allocate Additional Leaves to your employees and generate reports to track leaves taken by Employees.

Employees can also create leave requests, which their respective managers (leave approvers) can approve or reject. An Employee can select leaves from a number of leave types such as Sick Leave, Casual Leave, Privilege Leave and so on.

Related Topics

1. Holiday List
2. Leave Type
3. Leave Period
4. Leave Policy
5. Leave Allocation
6. Leave Application
7. Compensatory Leave Request
8. Leave Encashment
9. Leave Block List

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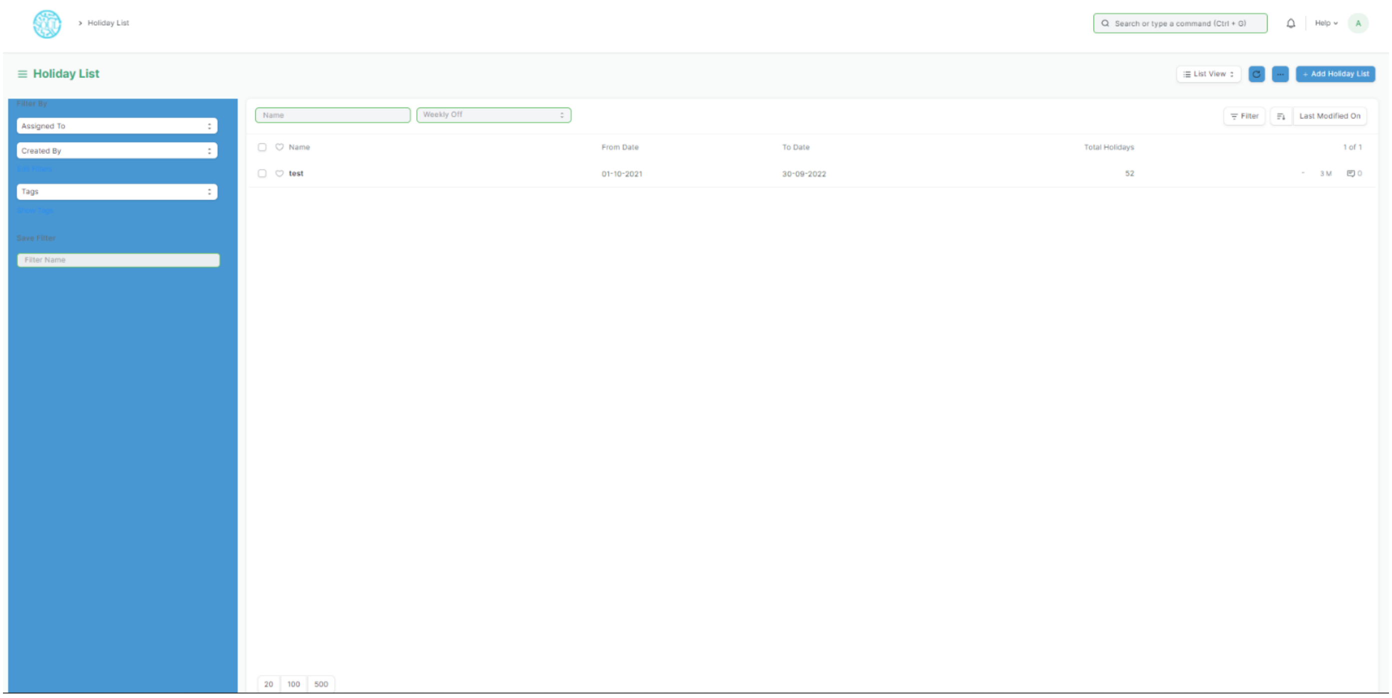
19. Holiday List

Holiday List is a list which contains the dates of holidays.

Most organizations have a standard Holiday List for their employees. However, some of them may have different holiday lists based on different Locations or Departments. In EduLead, you can configure multiple Holiday Lists and assign them to your employees based on your requirements.

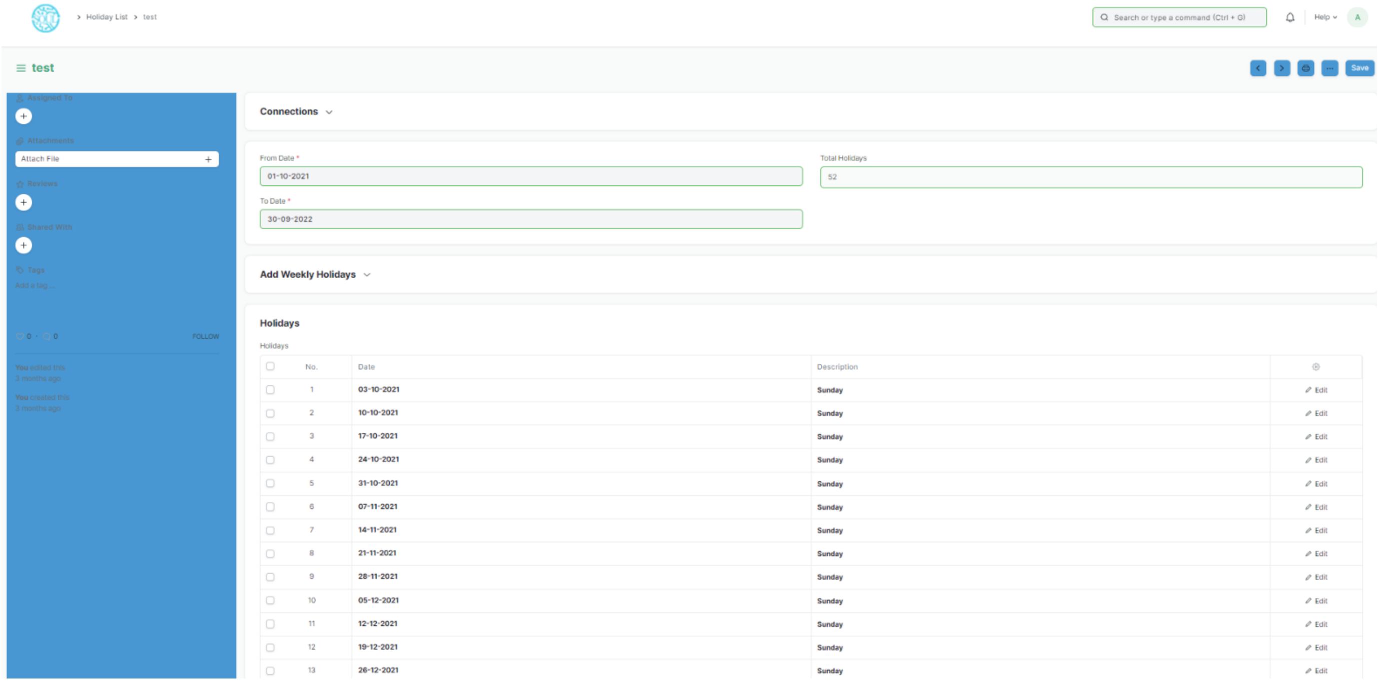
To access Holiday List, go to:

Home > Human Resources > Leaves > Holiday List



19.1 How to create a Holiday List

1. Go to Holiday List, click on New.
2. Enter Holiday List Name. It can be based on the Fiscal Year or Location or Department as per the requirement.
3. Select From Date and To Date for the Holiday List.



19.2 Features

Some of the additional features in the Holiday List are as follows:

19.2.1 Adding Weekly Holidays

You can quickly add Weekly Offs in the Holiday List as follows:

1. In the 'Add Weekly Holidays' section, select the day in the Weekly Off field.
2. Click on the 'Add to Holidays' button.
3. Save.

Once the Weekly Offs are added, it is reflected in the Holidays table.

Note: You can add multiple days in the Weekly Offs.
You can also add specific days (like festival holidays) manually by clicking on the 'Add row' option in the Holidays table.

Note: Each time a new holiday is updated in the Holidays table, the Total Holidays field gets updated.

19.2.2 Holiday List in Company

You can set a default Holiday List at the company-level in the Company master in the 'Default Holiday List' field.

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19.2.3 Holiday List in Employee

If you have created multiple Holiday List, select a specific Holiday List for an Employee in the respective master.

When an Employee applies for Leave, the days mentioned in the Holiday List will not be counted, as they are holidays already.

Note: If you have specified a Holiday List in the Employee master, then that Holiday List will be given priority as compared to the default Holiday List of the Company. You can form as many holiday lists as you wish. For example, if you have a factory, you can have one list for the factory workers and another list for office staff. You can manage between many lists by linking a Holiday List to the respective Employee.

19.2.4 Holiday List in Workstation

You can also set a Holiday List at workstation-level as shown in the screenshot below.

The dates in the Holiday List tagged in the Workstation master will be considered as the days the Workstation will remain closed.

19.3 Related Topics

1. Leave Allocation
2. Leave Period
3. Leave Policy
4. HR Settings

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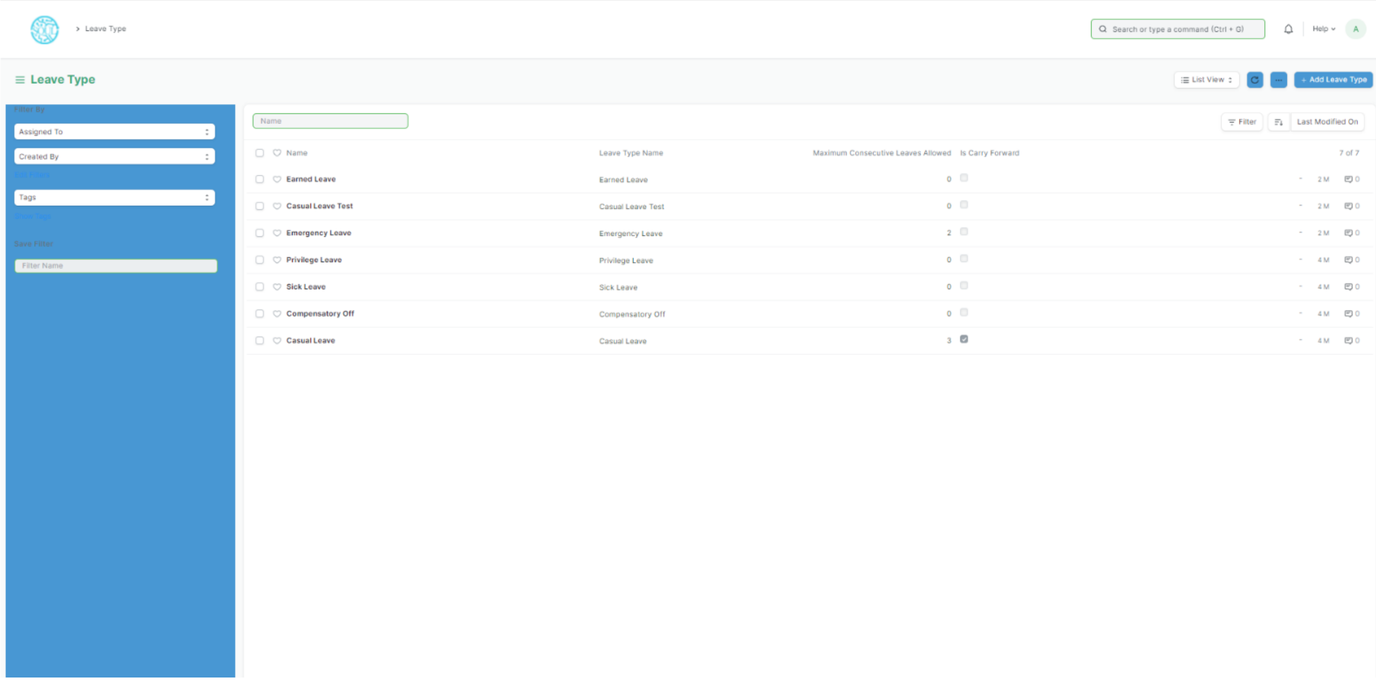
20. Leave Type

Leave Type refers to the types of leaves allocated to an Employee which they can use while making Leave Applications.

You can create any number of Leave Types based on your company's requirements.

To access Leave Type, go to:

Home > Human Resources > Leaves > Leave Type



20.1 How to create a Leave Type

1. Go to Leave Type list, click on New.
2. Enter Leave Type Name.
3. Enter Max Leaves Allowed, Applicable After (Working Days), Maximum Continuous Days Applicable (optional).
4. Save.

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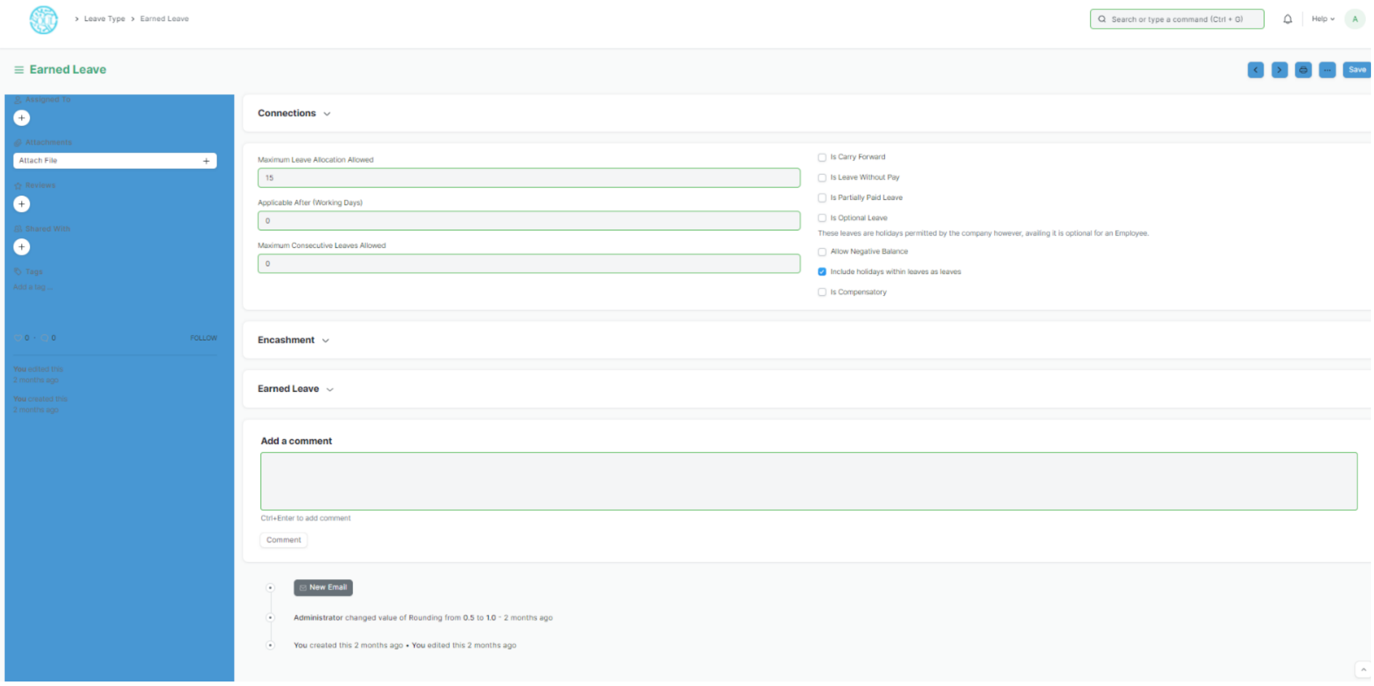

Below is a detailed explanation of all the fields and checkboxes in Leave Type.

- Max Leaves Allowed: This field allows you to set the maximum number of the annual allocation of this Leave Type while creating the Leave Policy.
- Applicable After (Working Days): Enter the minimum number of working days here. Only the employees who have worked for this number of days or more will be allowed to apply for this particular leave type. Any other leaves (such as Casual Leave, Sick Leave.etc.) availed by the Employees after their joining date will also be considered while calculating working days of the Employee.
- Maximum Continuous Days Applicable: It refers to the maximum number of days this particular Leave Type can be availed at a stretch. If an employee exceeds the maximum number of days, their extended leave will be considered as 'Leave Without Pay'.
- Is Carry Forward: If checked, the balance leaves of this Leave Type will be carried forward to the next allocation period.
- Is Leave Without Pay: This ensures that the Leave Type will be treated as leaves without pay and salary will get deducted for this Leave Type.
- Is Optional: Optional Leaves are holidays that Employees can choose to avail from a list of holidays published by the company. The Holiday List for Optional Leaves can have any number of holidays, but you can restrict the number of such leaves by setting the Max Days Leave Allowed field.
- Allow Negative Balance: If checked, the system will always allow to apply and approve Leave Applications for the Leave Type, even if there is no leave balance.

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- Include holidays within leaves as leaves: Check this option if you wish to count holidays within leaves as a ‘leave’. For example, if an Employee has applied for leave on Friday and Monday, and Saturday and Sunday are weekly offs, if the 'Include holidays within leaves as leaves' checkbox for the Leave Type is checked, the system will consider Saturday as Sunday as leaves too. Such holidays will be deducted from the total number of leaves.
- Is Compensatory: Compensatory leaves are leaves granted for working overtime or on holidays, normally compensated as an encashable leave. You can check this option to mark the Leave Type as compensatory. An Employee can request for compensatory leaves using Compensatory Leave Request.

- Is Partially Paid Leaves: This checkbox ensures that Leave Type will be treated as partially paid and some part of daily earnings will be paid through salary slip. If this checkbox is enabled then a field "Fraction of Daily Salary Per Leave" appears where you can define the fraction of daily salary paid on the partial leave day.

  Note: The Leave Type can be either Leave Without pay or Partially Paid.

20.2 Features

20.2.1 Leave Encashment

It is possible that Employees can receive cash from their Employer for unused leaves granted to them in a Leave Period. Not all Leave Types need to be encashable, so, you should set "Allow Encashment" for only those Leave Types which are encashable.

Note: Leave encashment is allowed only in the last month of the Leave Period.

Encashment Threshold Days: This field indicates the number of leave days the Employees won't be able to encash. Above the mentioned days, the Employee is eligible to encash leaves.

For example, if there are 10 leaves of a particular Leave Type which is encashable, and the Employee has 8 leaves left. If Encashment Threshold Days = 5, the Employee is given encashment of only 8 - 5 = 3 leaves.

Earning Component: This field allows you to specify the Salary Component that will be encashed to Employees as a part of their Salary in the Salary Slip.

Note: On submitting a Leave Encashment for an Employee, EduLead automatically creates an Additional Salary which will get added to the Salary Slip of the Employee when processing the next payroll.

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20.2.2 Earned Leave

Earned Leaves are leaves earned by an Employee after working with the company for a certain amount of time. Check-ing "Is Earned Leave" will allot leaves pro-rata basis by automatically updating Leave Allocation for leaves of this type at intervals set by 'Earned Leave Frequency'.

For example, an Employee is allotted 24 Privilege Leaves in a year, wherein the Privilege Leave is set as Earned Leave with Monthly allotment. In this case, the Employee will earn 2 (24 leaves/12 months) Privilege Leaves at the end of every month. The leave allotment process (background job) will only allot leaves considering the max leaves for the leave type and will round to 'Rounding' for fractions.

Note: The initial allocation of this Leave Type will be 0. Leaves will be updated at the end of the Month (or as per the 'Earned Leave Frequency' set).

20.2.3 Default Leave Types

There are some pre-loaded Leave Types in the system, as below:

- Leave Without Pay: You can avail these leaves for different purposes, such as extended medical issues, educational purposes, or unavoidable personal reasons. The 'Leave Without Pay' checkbox for this Leave Type is checked by default. The employee does not get paid for such leaves.
- Privilege leave: These are like earned leaves that can be availed for travel, family vacation, and so on.
- Sick leave: You can avail of these leaves if you are unwell.
- Compensatory off: These are compensatory leaves allotted to employees for overtime work. The 'Is Compensatory' checkbox for this Leave Type is checked by default.
- Casual leave: You can avail of this leave to take care of urgent and unseen matters.

20.3 Related Topics

1. Leave Period
2. Leave Policy
3. Leave Allocation
4. Leave Application
5. Compensatory Leave Request
6. Leave Encashment

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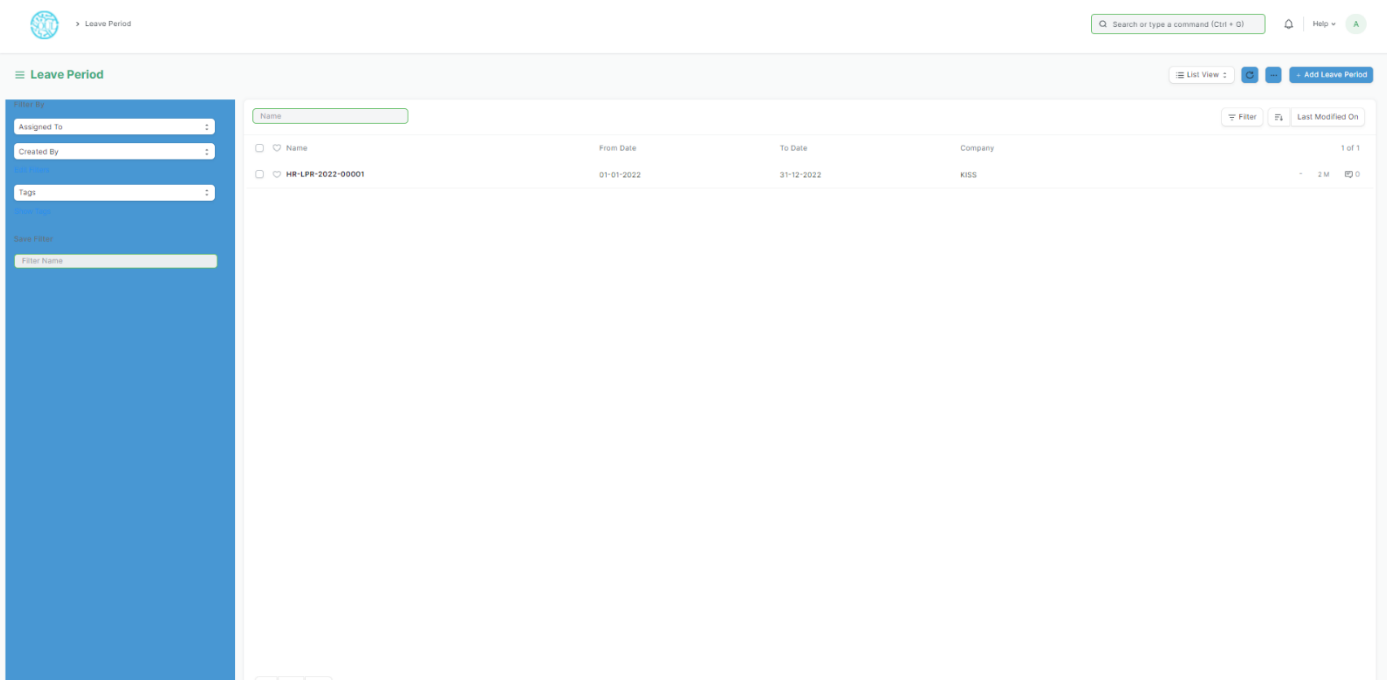
21. Leave Period

A Leave Period is a duration of time for which leaves are allocated.

Most companies manage leaves based on a Leave Period, corresponding to a calendar year or the fiscal year. To access Leave Period, go to:

Home > Human Resources > Leaves > Leave Period



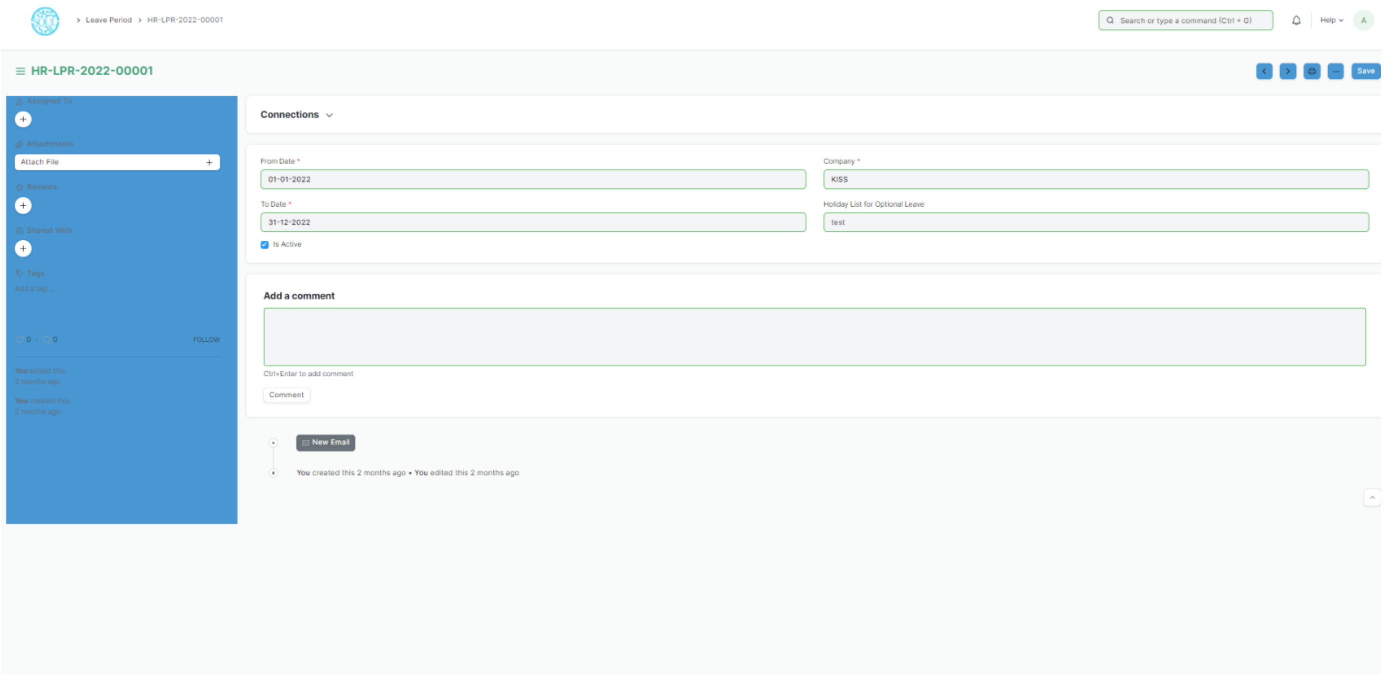
21.1 Prerequisites

Before creating a Leave Period, it is advisable to create the following:

1. Company
2. Holiday List

21.2 How to create a Leave Period

1. Go to Leave Period list, click on New.
2. Enter the From Date and To Date of the Leave Period.
3. Select the Company name for which the Leave Period is applicable.
4. Save.



The Leave Period also allows you to select a Holiday List for Optional Leaves (optional) which will be considered for allocating Optional Leaves for the period.

Note: The 'Holiday List for Optional Leaves' is not the same as the usual 'Holiday List'. This list will contain a list of optional holidays only. 'Holiday List for Optional Leaves' can be created from the Holiday List document. You can create two Holiday Lists for a Leave Period; one containing the usual set of holidays and the other for optional holidays.
Additionally, you can check the 'Is Active' checkbox if you want to enable this particular Leave Period.

21.3 Granting leave using Leave Period

Leaves could be granted via Leave Period through the "Grant Leaves" button. In version 13, leaves will be granted using Leave Policy Assignment.
Once the information is saved, the Leave Period will also be used as a tool to help you grant leaves for a category of employees.

The Grant button will generate Leave Allocations based on the Leave Policy applicable to each Employee. You can allocate leaves based on Employee Grade, Department or Designation as shown below.

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21.4 Related Topics

1. Leave Allocation
2. Leave Policy
3. Leave Type

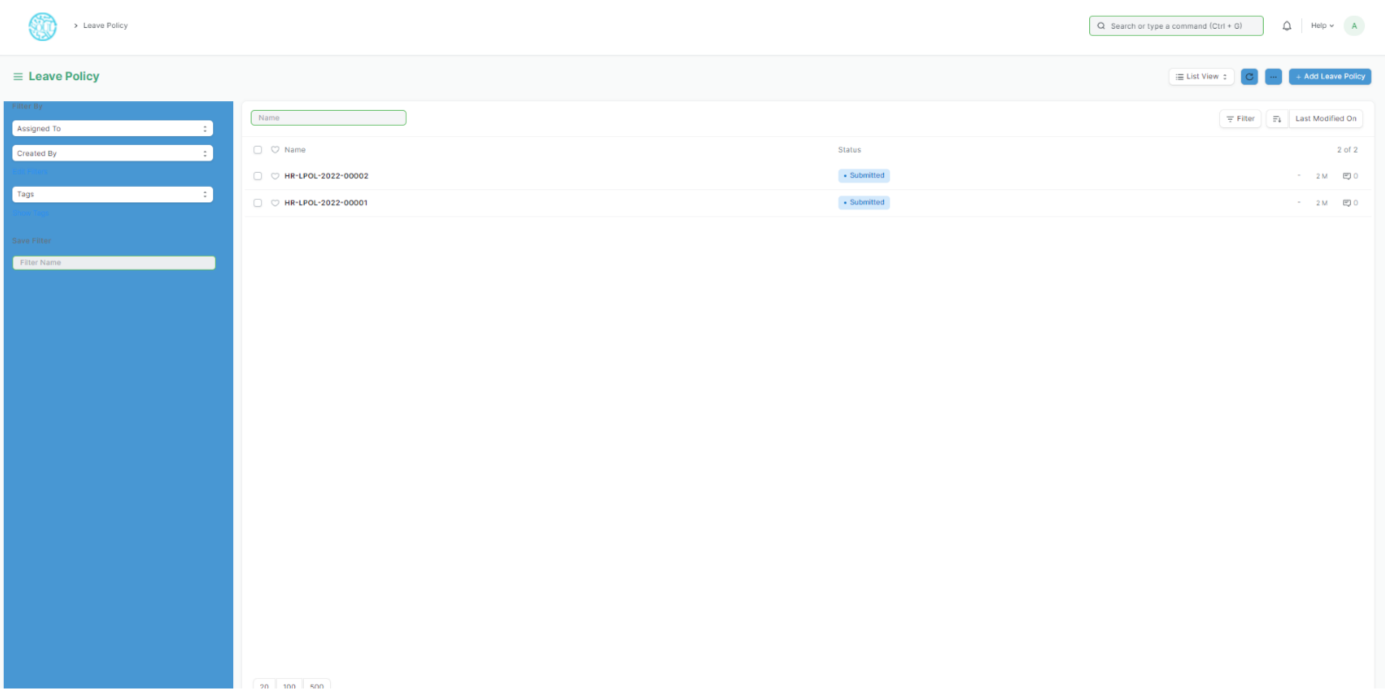
22. Leave Policy

The amount of entitled leaves in a Company for an Employee in a Leave Period is known as Leave Policy.

It is a practice for many enterprises to enforce a general Leave Policy to effectively track and manage Employee leaves. EduLead allows you to create and manage multiple Leave Policies and allocate leaves to Employees as defined by the policy.

To access Leave Policy, go to:

Home > Human Resources > Leaves > Leave Policy



22.1 How to create a Leave Policy

1. Go to Leave Policy list, click on New.
2. Select the Leave Type and enter its Annual Allocation.

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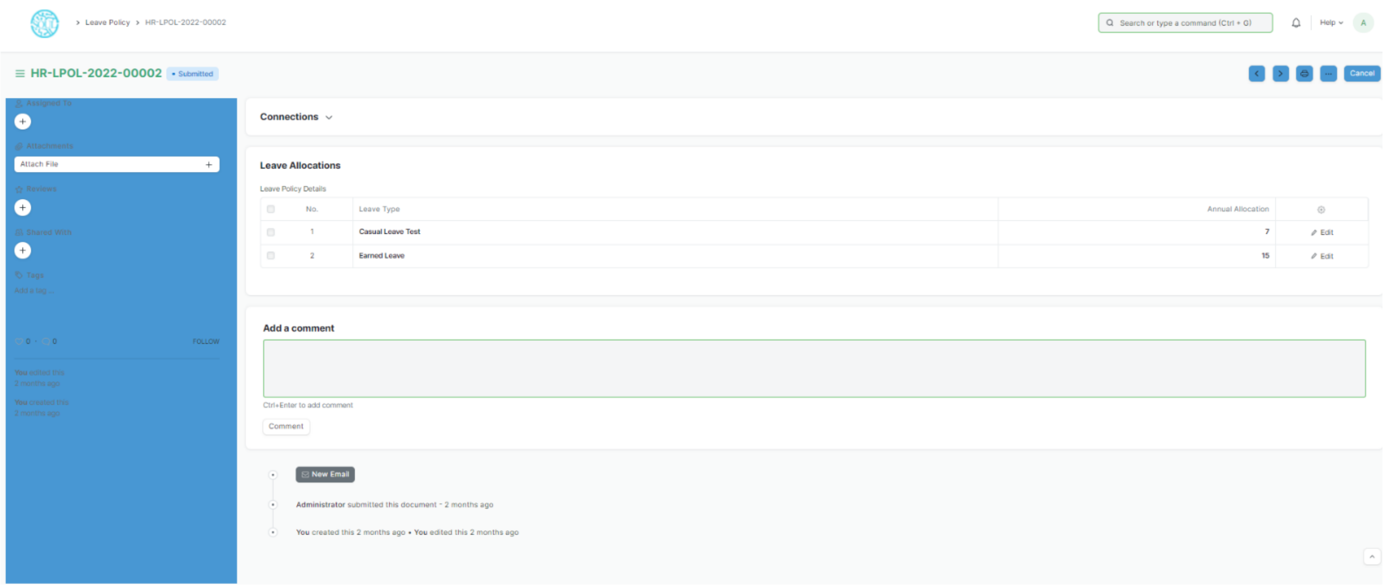
3. Save and Submit.



Once submitted, you can enforce the Leave Policy through the dashboard, either to an Employee or an Employee Grade.

When a Leave Policy is assigned to an Employee Grade, it will ensure that all leave allocations for employees of this grade will be as per the Leave Policy. In case you need to selectively update the Leave Policy for a particular Employee, you can do so by tagging the Leave Policy in the Employee master under the 'Attendance and Leave Details' section.

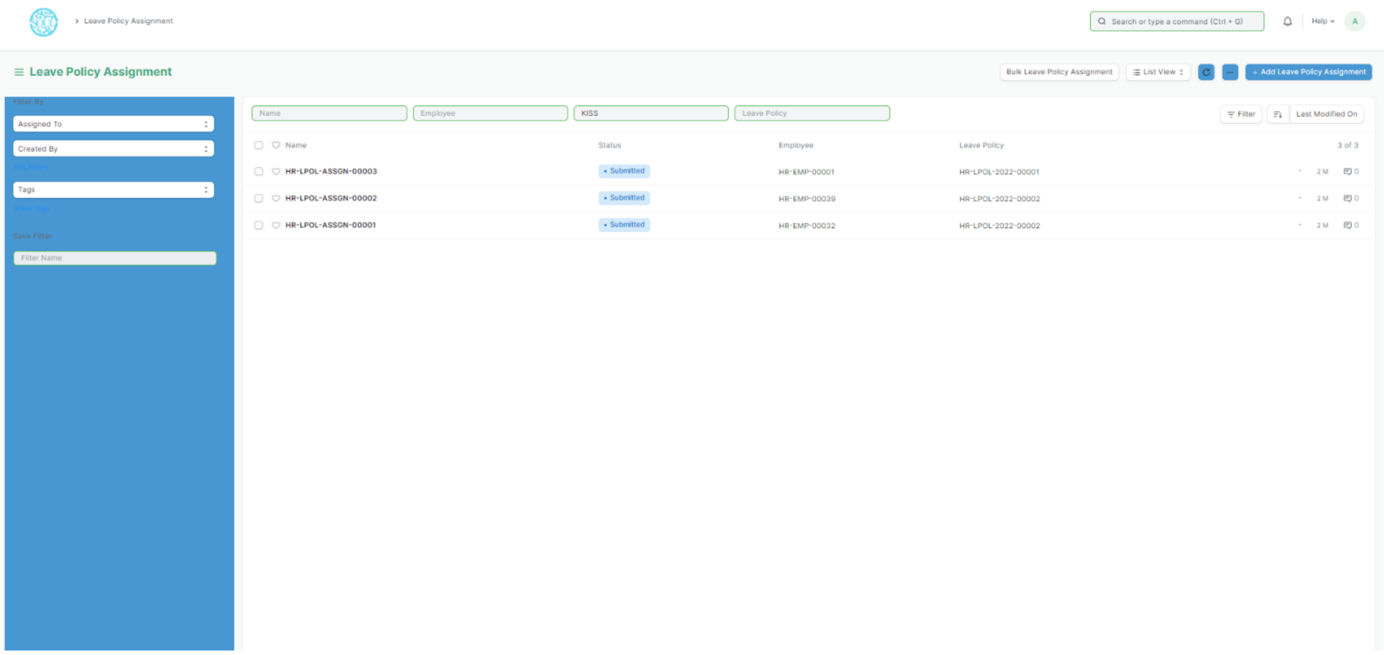
22.2 Related Topics

1. Leave Period
2. Leave Type
3. Employee
4. Employee Grade

23. Leave Policy Assignment

Leave Policy Assignment in EduLead is used to assign leaves to employees based on created policies. To access Leave policy assignment, go to:

Home > Human Resources > Leaves > Leave Policy Assignment



23.1 Prerequisites

Before creating a Leave Policy Assignment, it is advisable to create the following:

- Employee
- Leave Policy

23.2 How to create a Leave Policy Assignment

1. Go to Leave Policy Assignment, click on New.
2. Select Employee and Leave Policy.
3. Select Assignment based on the following as needed:
    - If "Assignment based on" is set to Leave Period, you need to select the applicable Leave Period. The Effective From and Effective To dates will be set automatically based on the Leave Period selected.
    - If "Assignment based on" is set to Joining Date, the Effective From date will be set to the employee's Date of Joining.
    - If "Assignment based on" is left blank, then you will have to set the Effective From and Effective To date manually.
4. Save and Submit.

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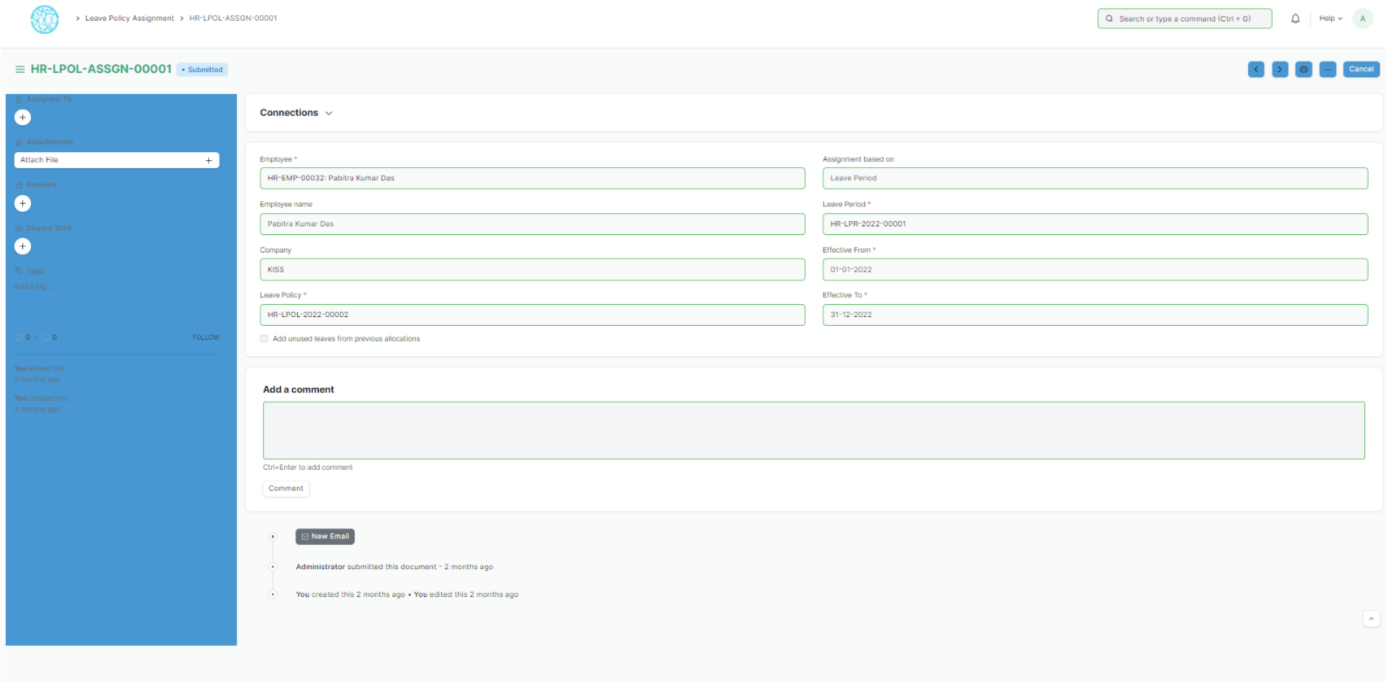

23.3 Granting Leaves

Once the information is saved, the Leave Policy Assignment will also be used as a tool to help you grant leaves to employees. The Grant Leave button will appear at the right top corner.

On clicking the "Grant Leave" button, Leave Allocation will be automatically created based on the Leave Policy as shown below.

Note: The Grant Leave button will appear only if there are no leaves granted or there is no allocation against a current Leave Policy Assignment.

23.4 Automatically Allocate Leaves Based On Leave Policy

To enable automatic allocation of leaves based on the Leave Policy Assignment, enable Automatic Allocate Leaves Based On Leave Policy checkbox in HR Settings. The scheduler then runs a background job and checks the Effective From date in the Leave Policy Assignment to create leave allocations automatically.

Note: Leaves will be automatically granted only if, there are no leaves granted against that Leave Policy Assignment till Effective From date.

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23.5 Features

23.5.1 Bulk Leave Policy Assignment

EduLead also allows creating multiple Leave Policy Assignment for multiple employees.

1. Go to Leave Policy Assignment list, click on Bulk Leave Policy Assignment.
2. Dialog Will appear, Select Employee. You can filter Employee based on Company and Department or You can also use standard filters by clicking Add Filters.
3. Select Leave Policy and Effective From and Effective To dates.
4. Click on Assign.

23.5.2 Granting leaves to multiple employees

Leaves can be granted based on multiple Leave Policy Assignments to multiple employees.

1. Go to Leave Policy Assignment list, click on Grant Leaves.
2. A dialog will be shown. Select the Leave Policy Assignments. You can filter the assignments based on Company and Employee or you can also use standard filters by clicking on the Add Filters button.
3. Select the Leave Policy Assignments.
4. Click on Grant Leaves.

24. Leave Allocation

Leave Allocation enables you to allocate a specific number of leaves of a particular type to an Employee.

To access Leave Allocation, go to:

Home > Human Resources > Leaves > Leave Allocation

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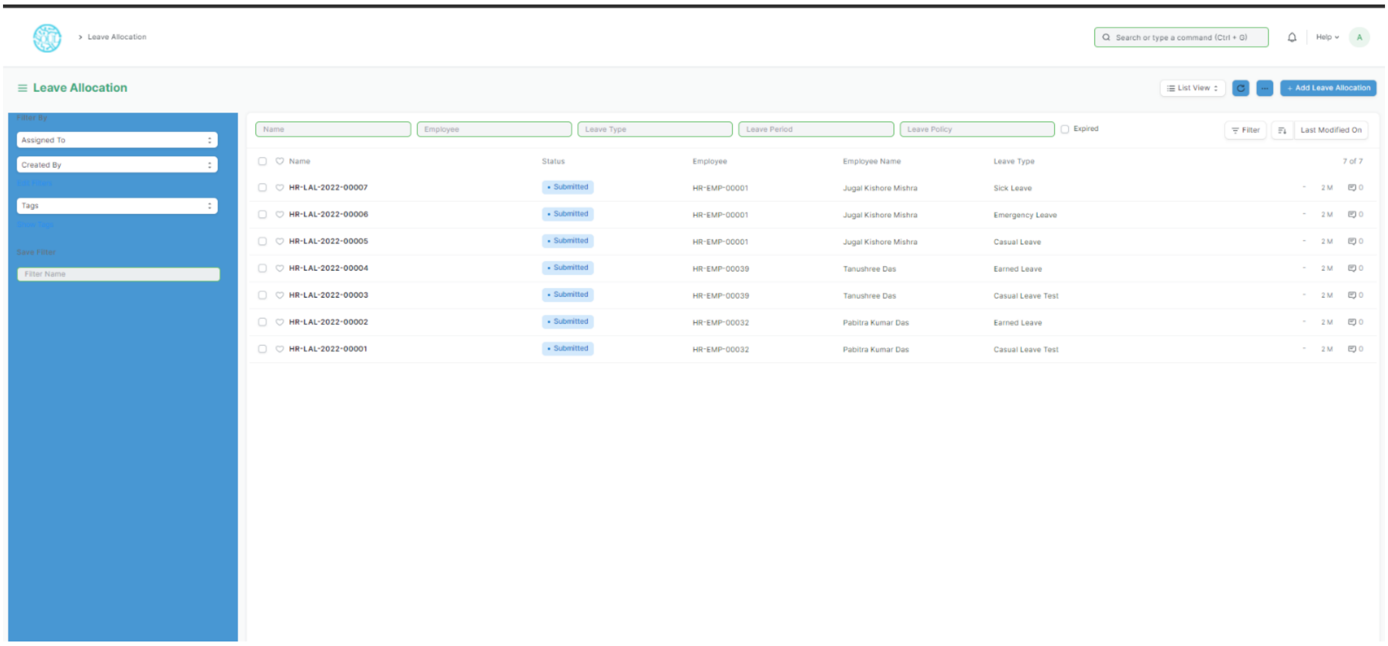


24.1 Prerequisites

Before creating a Leave Allocation, it is advisable you create the following documents:

- Employee
- Leave Type
- Leave Period
- Leave Policy

24.2 How to create a Leave Allocation

1. Go to Leave Allocation list, click on New.
2. Select the Employee, Leave Type, From Date and To Date.
3. Enter the number of New Leaves Allocated for that particular Leave Type.
4. Save and Submit.

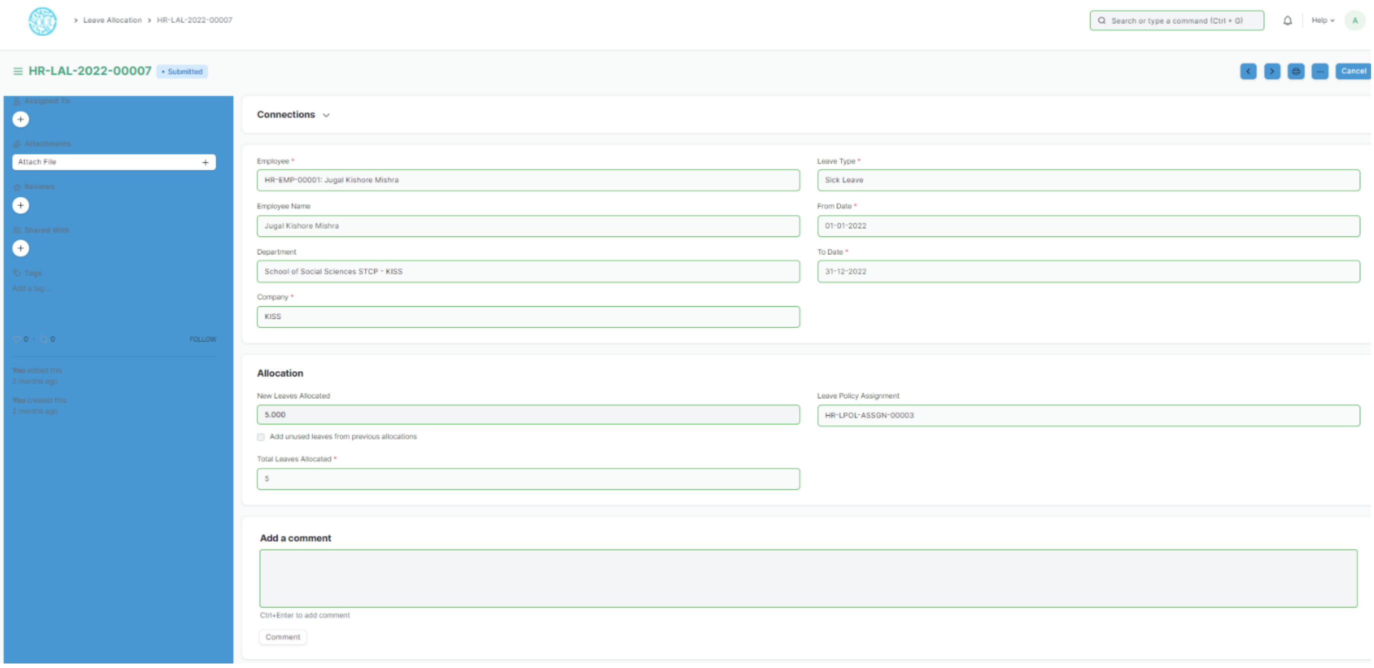
Note: Enable the 'Add unused leaves from previous allocations' option in case you want to carry forward unused leaves from the previous allocation period for this particular Leave Type.

24.2.1 Allocating Leaves through Leave Period

Leaves are usually allocated for a particular Leave Period. Once a Leave Period is created and saved, you can click on the Grant button to generate Leave Allocations based on the Leave Policy applicable to each Employee.

You can allocate leaves based on Employee Grade, Department or Designation.

Once granted, the leaves will be automatically allocated to the selected Employees based on the Leave Policy set in their Employee master. You can check the newly allocated leaves in the Leave Allocation list.



24.3. Related Topics

1. Leave Application
2. Compensatory Leave Request
3. Leave Encashment
4. Leave Block List
5. Holiday List

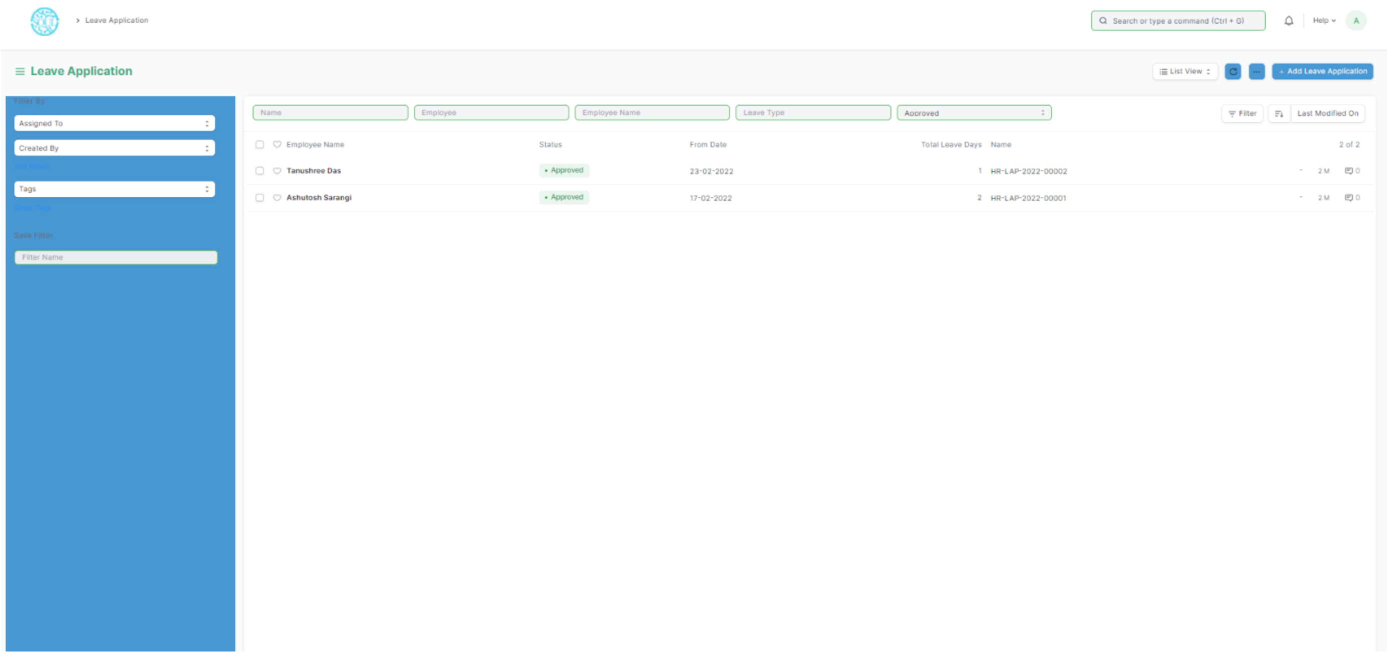
25. Leave Application

Leave Application is a formal document created by an Employee to apply for Leaves for a particular time period.

EduLead allows your employees to apply for leaves via Leave Applications and get them approved by the Leave Approvers.

To access Leave Application, go to:

Home > Human Resources > Leaves > Leave Application



25.1 Prerequisites

Before you create a Leave Application, it is advisable you have the following documents:

1. Department
2. Leave Period
3. Holiday List
4. Leave Type
5. Leave Policy
6. Leave Allocation

25.2 How to create a Leave Application

1. Go to Leave Application list, click on New.
2. A table of Allocated Leaves will be shown. Based on the Leaves taken, the available leaves are displayed for each Leave Type.
3. Select the Employee Name and Leave Type.
4. Set the Leave duration using From Date and To Date. Based on the dates selected, the 'Total Leave Days' and the 'Leave Balance Before Application' fields will be displayed.
5. If the Leave applied is for a half-day, select the 'Half Day' checkbox.
6. Enter the Reason for Leave.
7. Select Leave Approver.
8. Select the Posting Date of the Leave Application.
9. Check the 'Follow via Email' checkbox to send notification of the Leave Application to the Leave Approver.

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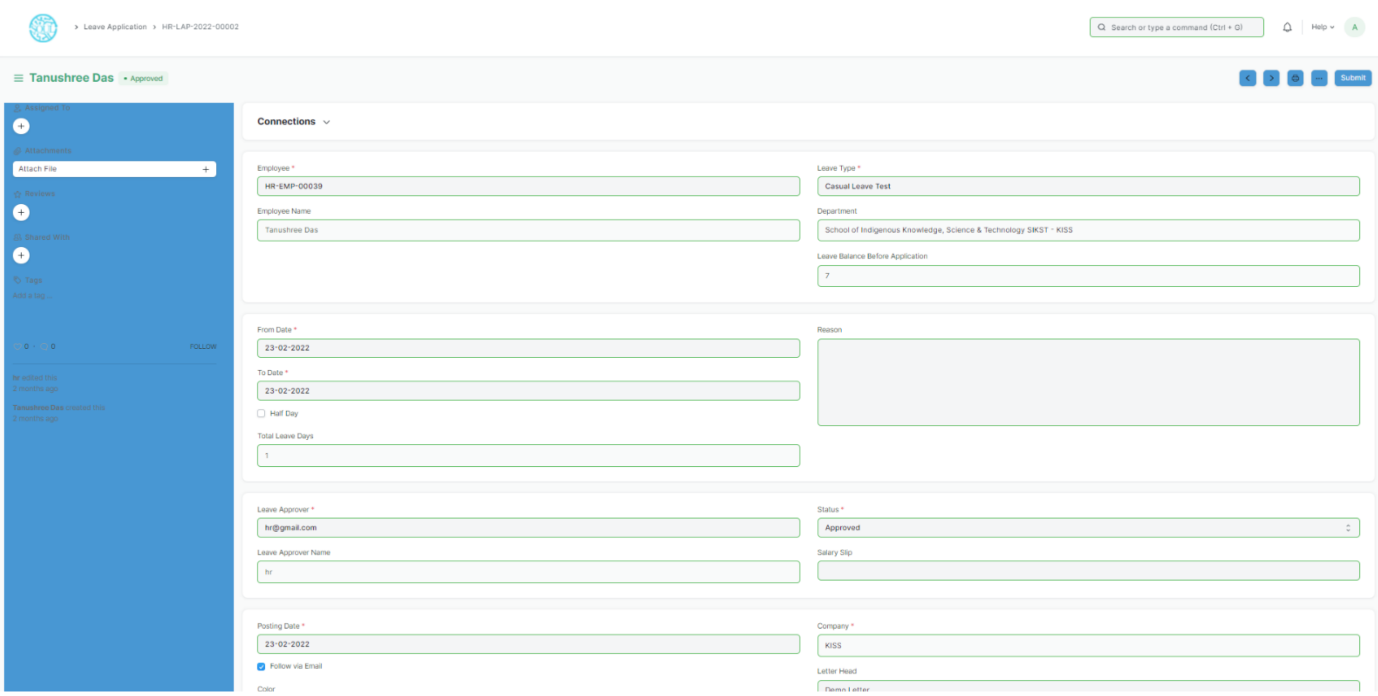
10. You can also link the Salary Slip of the Employee in the Leave Application for the record.
11. Click on Save. Once the Employee saves the Leave Application, the status of the Leave Application changes to 'Open', and an email is sent to the Leave Approver for approval. The Leave Approval Notification Template can be configured in HR Settings under the Leave Settings section.
12. Once the Leave Approver receives the email, they can Approve, Reject, or Cancel the Leave Application. Once this is done, the Leave Approver can submit the Leave Application. On submission, the status of the document changes accordingly, and an email is sent to the Employee notifying them the same.

Note: Leave Application cannot be submitted if the Salary is already processed for the leave period.

The Leave Application process flow is summarized below:

1. The employee applies for leave through Leave Application.
2. Approver gets notification via email. For this, the "Follow via Email" checkbox should be checked.
3. Approver reviews Leave Application.
4. Approver approves/rejects/cancels Leave Application
5. The employee gets the notification on the status of his/her Leave Application



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25.3 Features

25.3.1 Setting Leave Approver

A leave approver is a user who can approve a Leave Application of an Employee. In EduLead version 12, Leave Approvers can be set at two levels:

1. Department Level: Leave Approvers for each department can be configured in the Department master. Multiple Leave Approvers can be set in a Department. The first Leave Approver in the list will be considered as the default Leave Approver.
2. When an Employee belonging to a particular department applies for leave, the Leave Approvers set in that Employee's department master will be considered as his Leave Approvers.
3. Employee Level: Leave Approvers can also be set Employee-wise in the employee master.

If Leave Approvers are set at both Employee-level and Department-level, the Employee-level Leave Approver will be considered as the default Leave Approver in this case.

When a new Leave Application is created, if the selected leave approver does not have access to it, the document is shared with the approver with "submit" permission.

Tip: If you want all users to create their own Leave Applications, you can set their “Employee ID” as a match rule in the Leave Application Permission settings. Check Setting Up Permissions for more information.

Additional Notes:

1. Leave Application period must be within a single Leave Allocation period. In case, you are applying for leave across the leave allocation period, you have to create two Leave Application records.
2. Leave Application period must be in the latest Leave Allocation period.
3. Employee cannot apply for leave on the dates which are added in the Leave Block List.

To understand how EduLead allows you configure leaves for employees, check Leaves.

25.4 Related Topics

1. Leave Type
2. Leave Period
3. Leave Policy
4. Leave Allocation

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5. Leave Block List

26. Compensatory Leave Request

Compensatory Leave is a leave that is granted to an Employee as compensation for working overtime or on holidays.

EduLead allows Employees to request for Compensatory Leaves through the Compensatory Leave Request document. It is necessary that the dates mentioned in the Compensatory Leave Request should be in default Holiday List and also that the Employee should have their attendance marked Present.

Note: Only Leave Types which are marked as 'Is Compensatory' can be selected in the Compensatory Leave Request.
To access Compensatory Leave Request, go to:

Home > Human Resources > Leaves > Compensatory Leave Request

26.1 Prerequisites

Before creating a Compensatory Leave Request, it is necessary to create the following documents:

- Employee
- Leave Period
- Leave Type
- Leave Policy
- Leave Allocation
- Holiday List
- Attendance

26.2 How to create a Compensatory Leave Request

1. Go to Compensatory Leave Request list, click on New.
2. Select the Employee ID. Once selected, The Employee Name and Department will get automatically fetched.
3. Select Leave Type.
4. Select Work From Date and Work End Date. This is the date of the day(s) the Employee has worked on, during a Holiday.
5. Enter the Reason.
6. Save and Submit.

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On submitting the Compensatory Leave Request, EduLead updates the Leave Allocation record for the Compensatory leave type, allowing the Employee to apply for leaves of this type later on depending upon the number of leaves left.

26.3 Related Topics

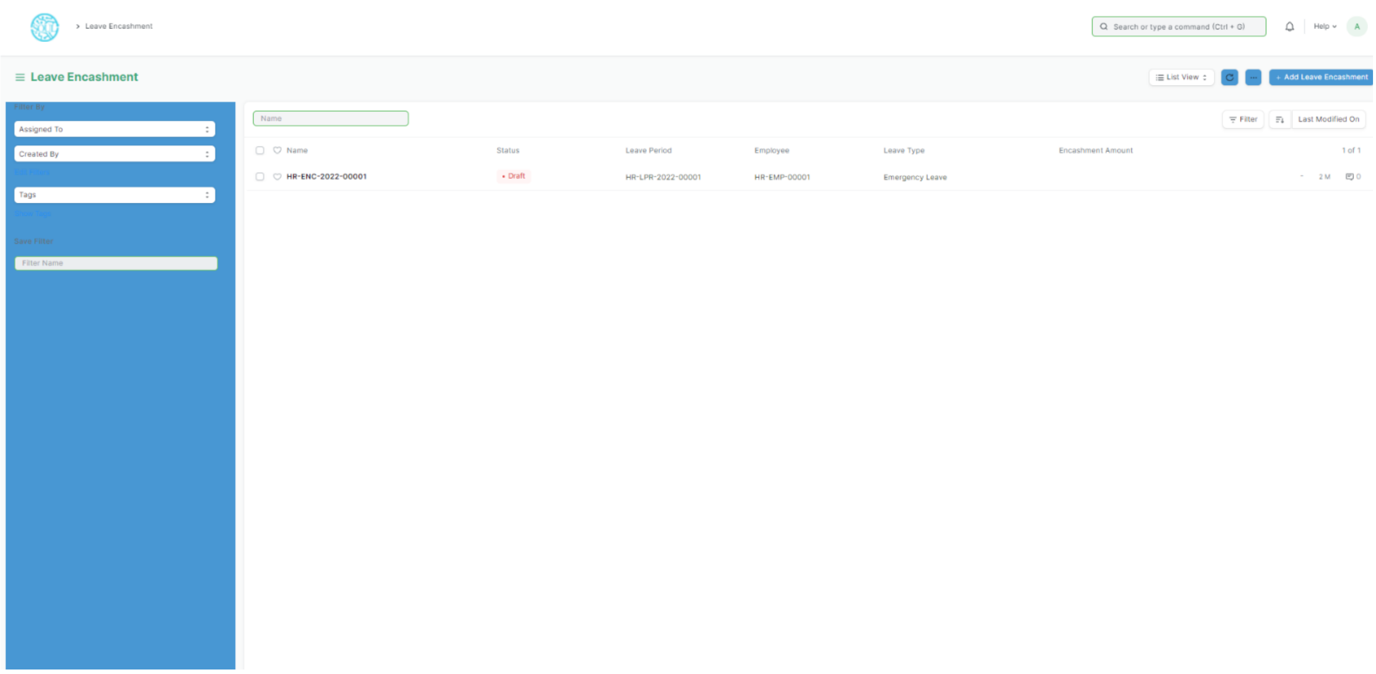
1. Leave Application
2. Leave Encashment
3. Leave Block List

27. Leave Encashment

Leave Encashment refers to an amount of money received in exchange for Leaves not availed by an Employee. You can submit Leave Encashment for Leave Types which are encashable.

To access Leave Encashment, go to:

Home > Human Resources > Leaves > Leave Encashment



27.1 Prerequisites

Before creating Leave Encashment, it is advisable you create the following documents:

1. Employee
2. Leave Type
3. Leave Policy

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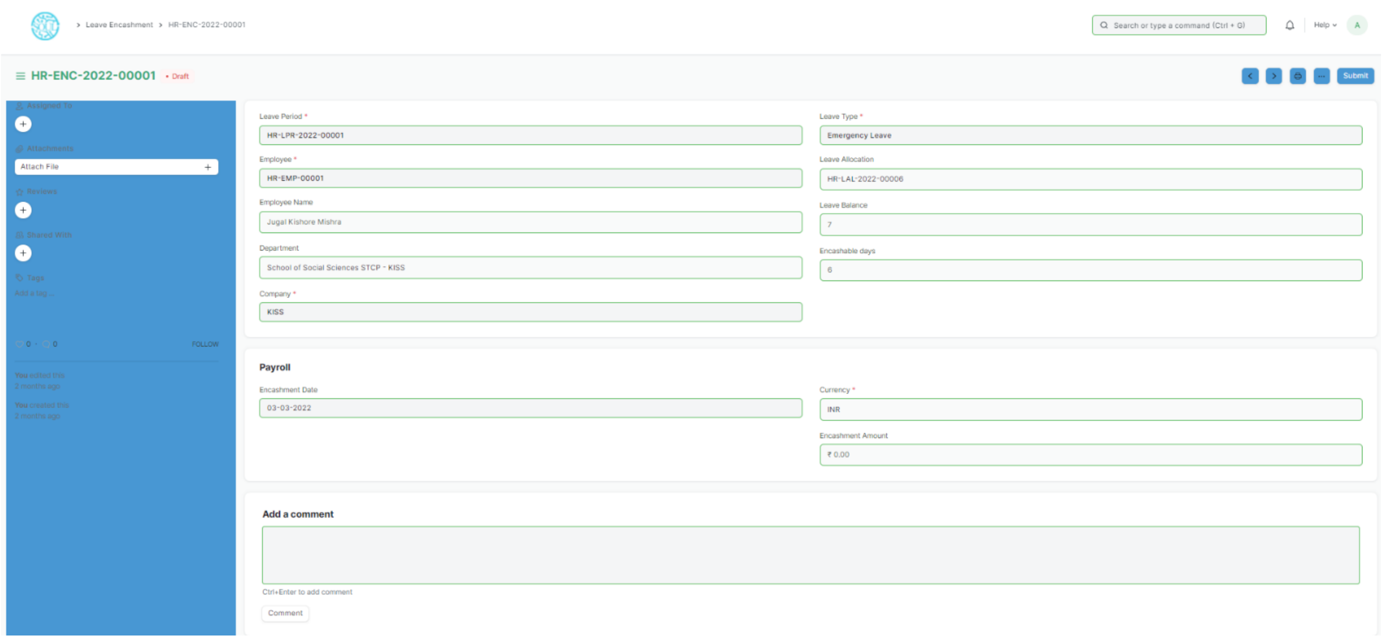
4. Leave Period
5. Salary Structure
6. Salary Structure Assignment

27.2 How to create a Leave Encashment

1. Go to Leave Encashment list, click on New.
2. Select Leave Period.
3. Select the Employee. Once the Employee is selected, the Employee's Department is automatically fetched.
4. Select Leave Type for which the Leave is encashed. Make sure the Leave Type is encashable (the 'Allow Encashment' checkbox in the Leave Type is checked).
5. Select Encashment Date. Based on the date selected, the amount will be encashed in that particular Payroll Entry.
6. Save and Submit.



Note: As you select Employee and Leave Type, Leave Balance and Encashable Days (which is total leave balance minus the threshold days set in Leave Type) will be shown along with the Encashment Amount based on the Leave Encashment per day as configured in the Employee's assigned Salary Structure.

On submitting a Leave Encashment for an Employee, EduLead automatically creates an Additional Salary which will get added to the Salary Slip of the Employee when processing the payroll.

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27.3 Related Topics

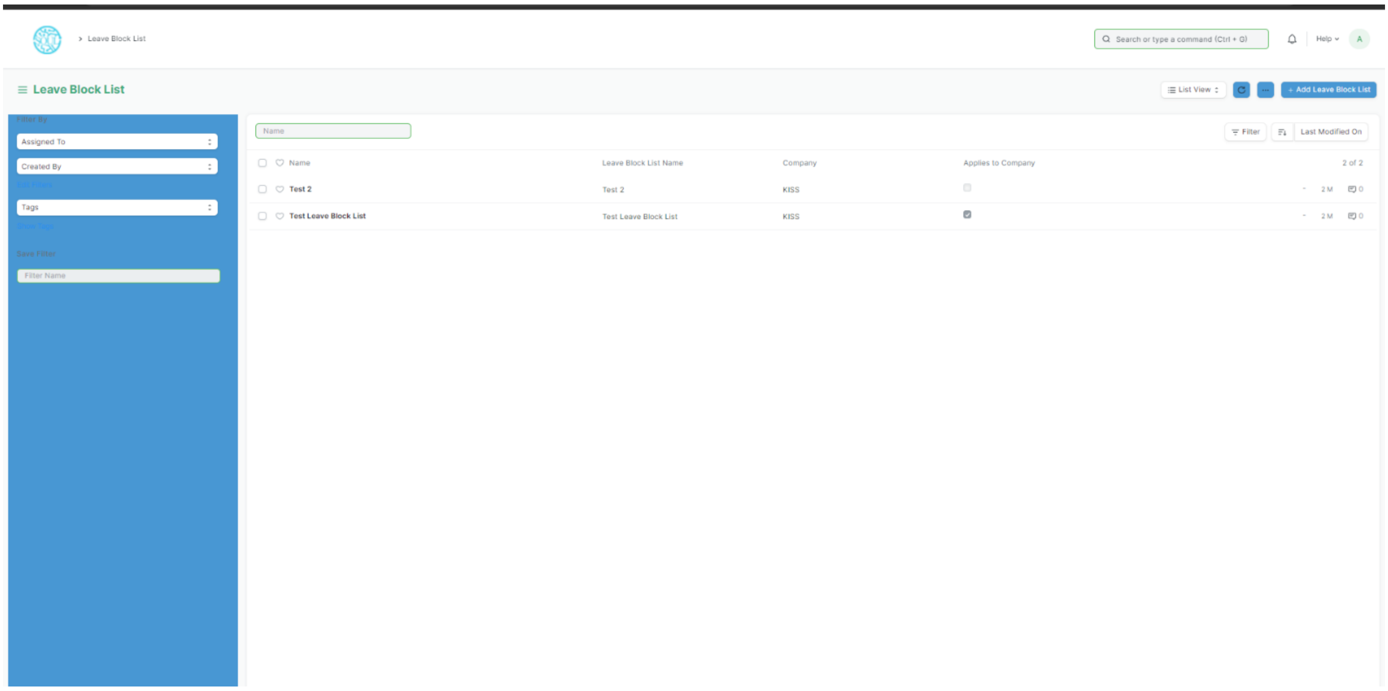
1. Payroll Period
2. Payroll Entry
3. Additional Salary

28. Leave Block List

Leave Block List is a list of dates in a year, on which employees cannot apply for leave.

To access Leave Block List, go to:

Home > Human Resources > Leaves > Leave Block List



EduLead allows you to define a list of Leave Approvers who can approve Leave Applications on blocked days, in case of urgency. You can also define whether the list will be applied to the entire company or on any specific departments.

28.1 Prerequisites

Before you create a Leave Block List, it is advisable you have the following documents:

- Company
- Department
- Leave Period
- Holiday List

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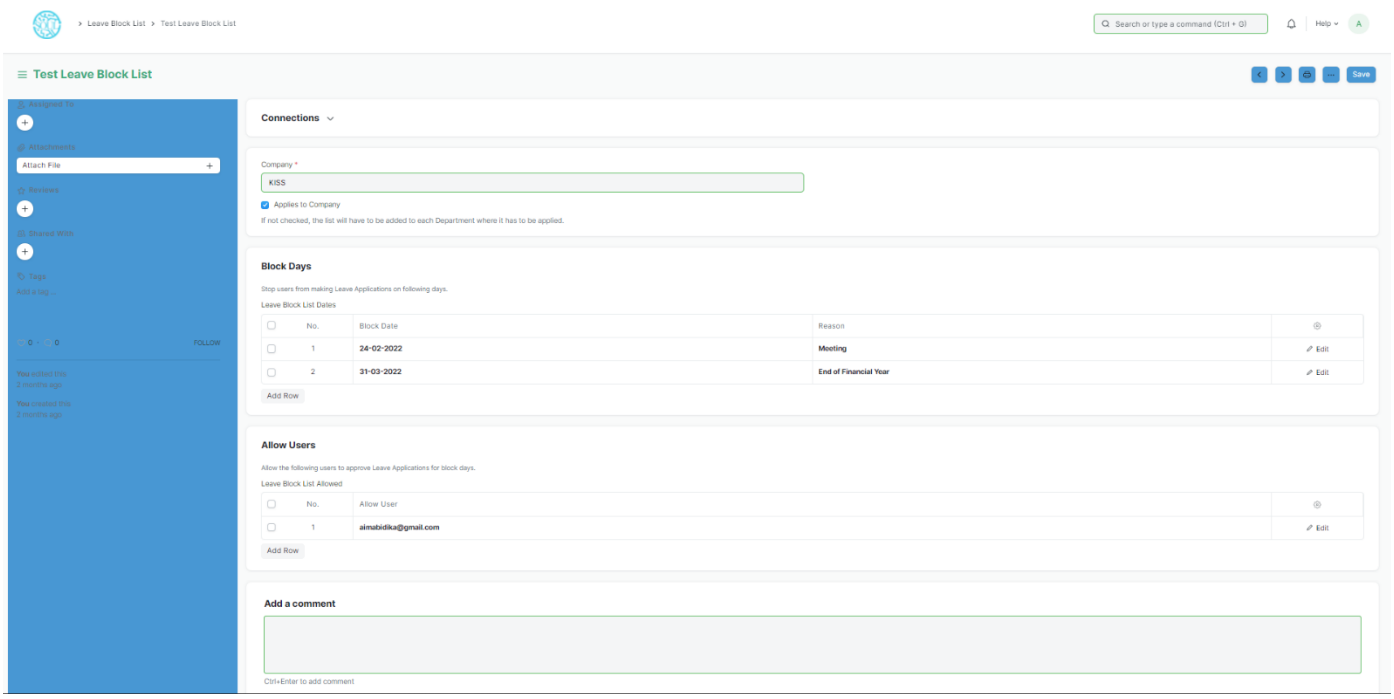
28.2 How to create a Leave Block List

1. Go to Leave Block list, and click on New.
2. Enter Leave Block List Name.
3. Enter Block Date and Reason in the 'Leave Block List Dates' table.
4. Enter Users to approve Leave Applications for Blocked Days in the 'Leave BLock List Allowed' table.
5. Save.



Note: Enable the 'Applies to Company' option if you want the Leave Block List to be applicable for the entire Company. If not checked, the list will have to be added to each Department where it has to be applied.

28.3 Related Topics

1. Leave Type
2. Leave Period
3. Leave Policy
4. Leave Allocation
5. Leave Application

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29. Leave Ledger Entry

A unified ledger for all leave related transactions for an employee. This maintains all the leaves related transactions, this includes the leave allocations, leave applications and leave encashments of your employees.

30. Recruitment

It is important for enterprises to create and manage vacant positions, job applicants and also create and manage recruitment plans. EduLead helps you create recruitment plans and create and publish job openings accordingly, making it easy to manage your hiring process. To understand how you can do configure this, check Staffing Plan.

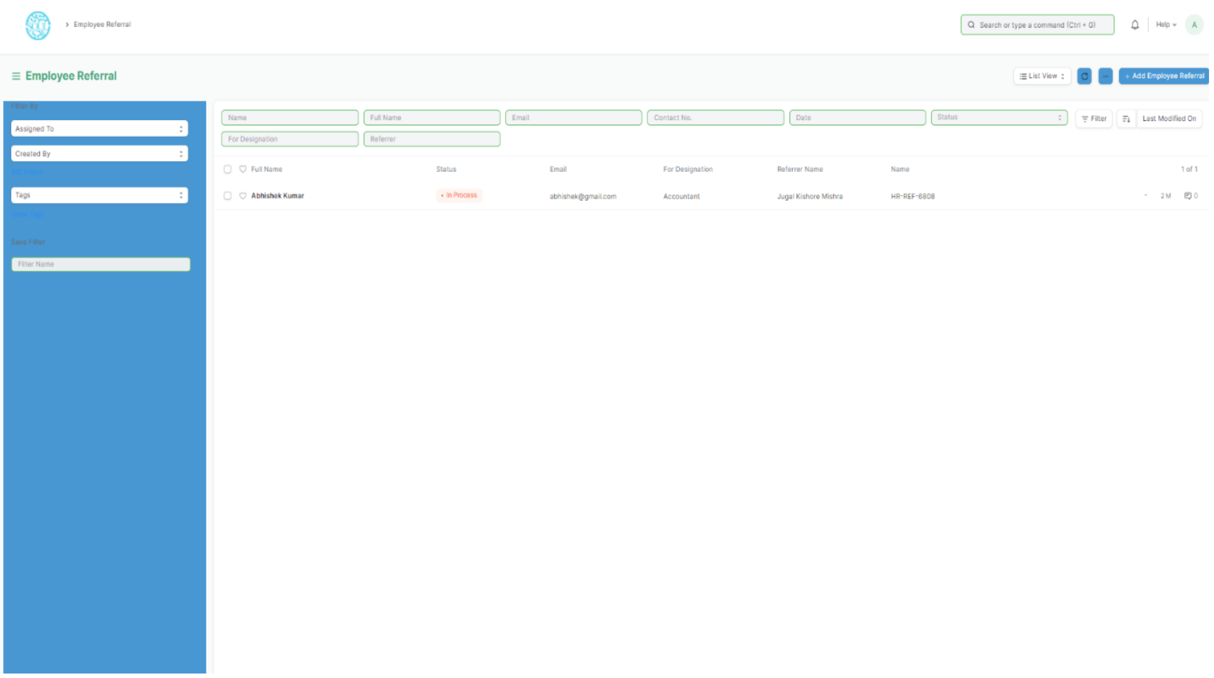
31. Employee Referral

Internal Recruitment is one of the best processes for recruitment, and it also saves effort and capital. The Employee Referral is a process where existing employees refer a suitable candidate from their network for a vacant designation/position.

In EduLead, you can manage Employee Referrals.

To access Employee Referral, go to:

Human Resources > Recruitment > Employee Referral



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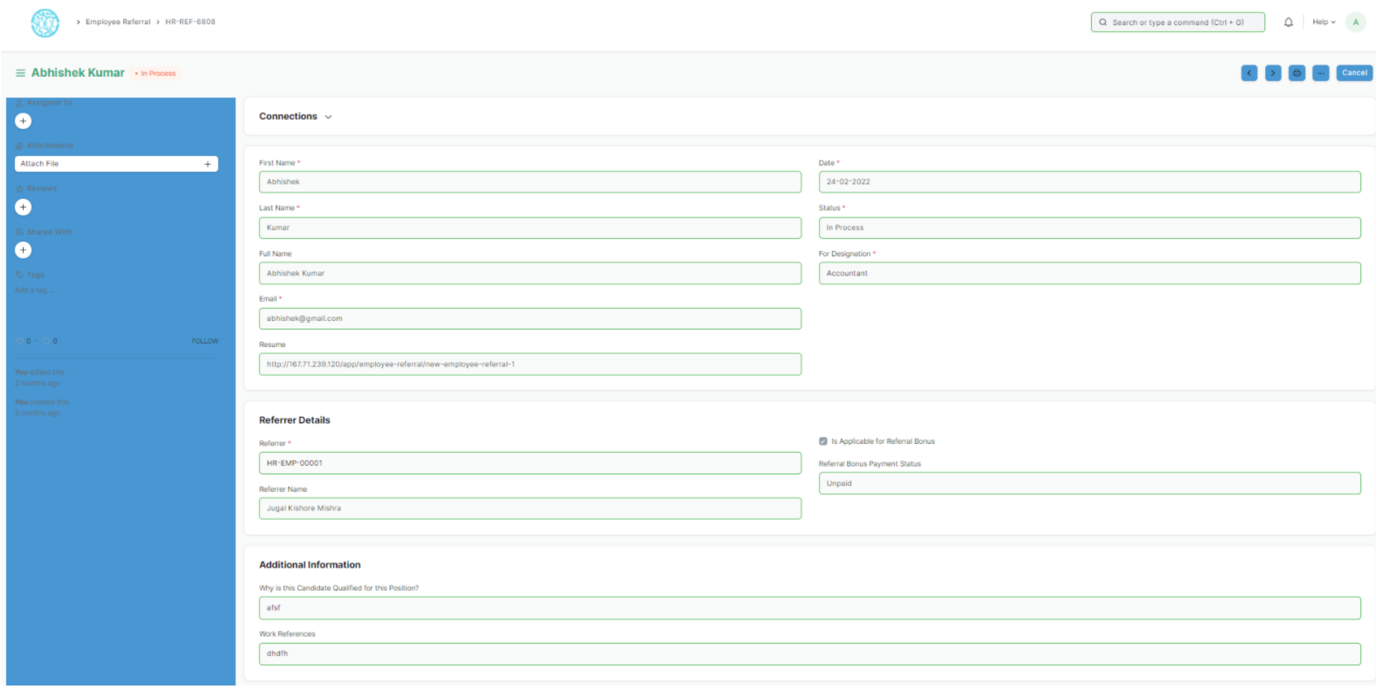
31.1 Prerequisites

1. Employee
2. Additional Salary
3. Job Applicant

31.2 How to create Employee Referral

1. Go to Employee Referral > Add Employee Referral.
2. Fill in basic details of the person you want to refer like First Name, Last Name, Email, etc.
3. Select Employee under Referrer.
4. Save and Submit.



31.3 Features

31.3.1 Creating Job Applicant and auto-syncing status from Job Applicant

When you submit an employee referral document the initial status will be "Pending". After submitting the document, the "Create Job Applicant" button will appear at the top right corner.

Clicking this button will create a new Job Applicant with the status "Open". The status of the Employee Referral document will change to "In Process"

When someone changes the status of the Job Applicant to "Hold" or "Replied", the status of the Employee Referral will remain "In Process". If the status of the Job Applicant changes to "Accepted" or "Rejected", the status of the Employee Referral document will also change to "Accepted" or "Rejected" respectively.

31.3.2 Managing referral bonus

Many companies provide bonuses to their employees for such referrals. EduLead allows you to track the payment of the bonus to the employee for their referral.

For the Referral bonus, you need to check the "Is applicable for referral bonus" checkbox before submitting the document. After submitting the document, the "Create Additional Salary" button will appear at the top right corner, if the status is "Accepted".

On Click, It will redirect you to the Additional salary form where you need to select Salary component and Payroll date and after that, you need to save and submit the document.

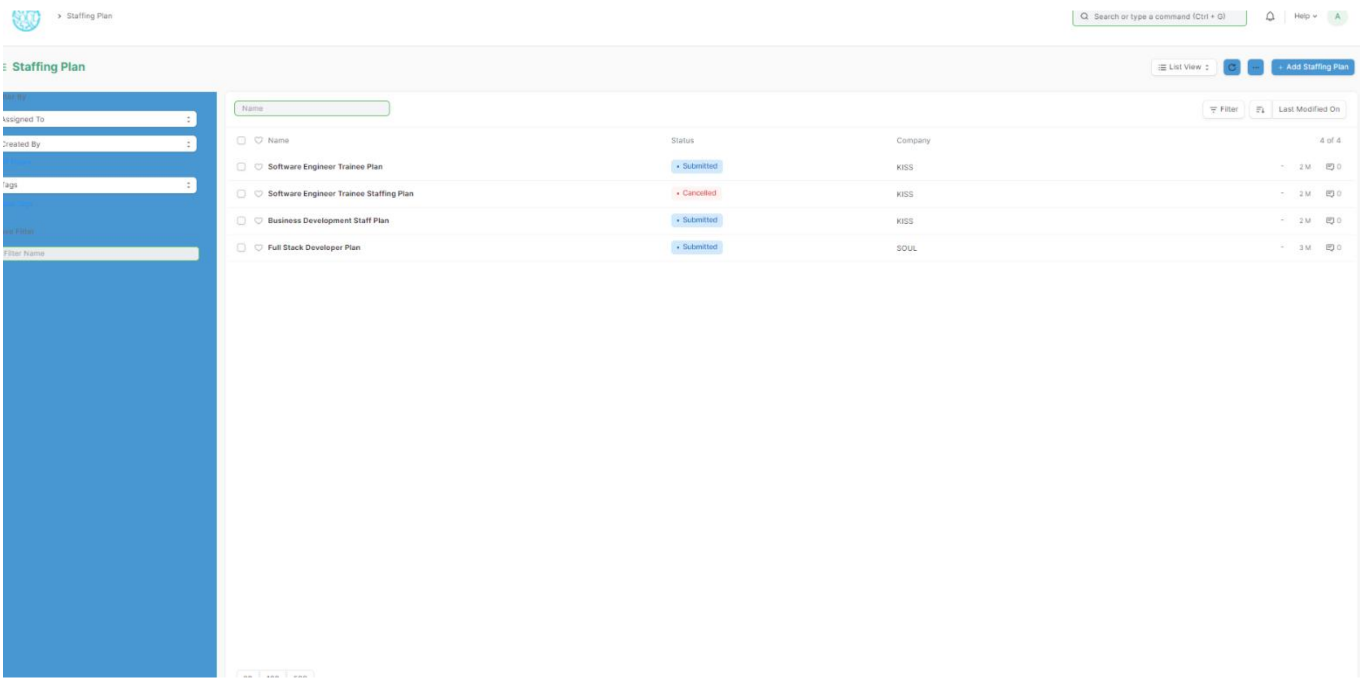
32. Staffing Plan

Staffing Plan helps you to plan manpower requirements for your Company.

EduLead allows you to do this at a company level helping you efficiently plan and budget new hirings for a period. Job Openings can only be created as per the number of vacancies and budget as per the active Staffing Plan.

To access Staffing, go to:

Home > Human Resources > Recruitment > Staffing Plan



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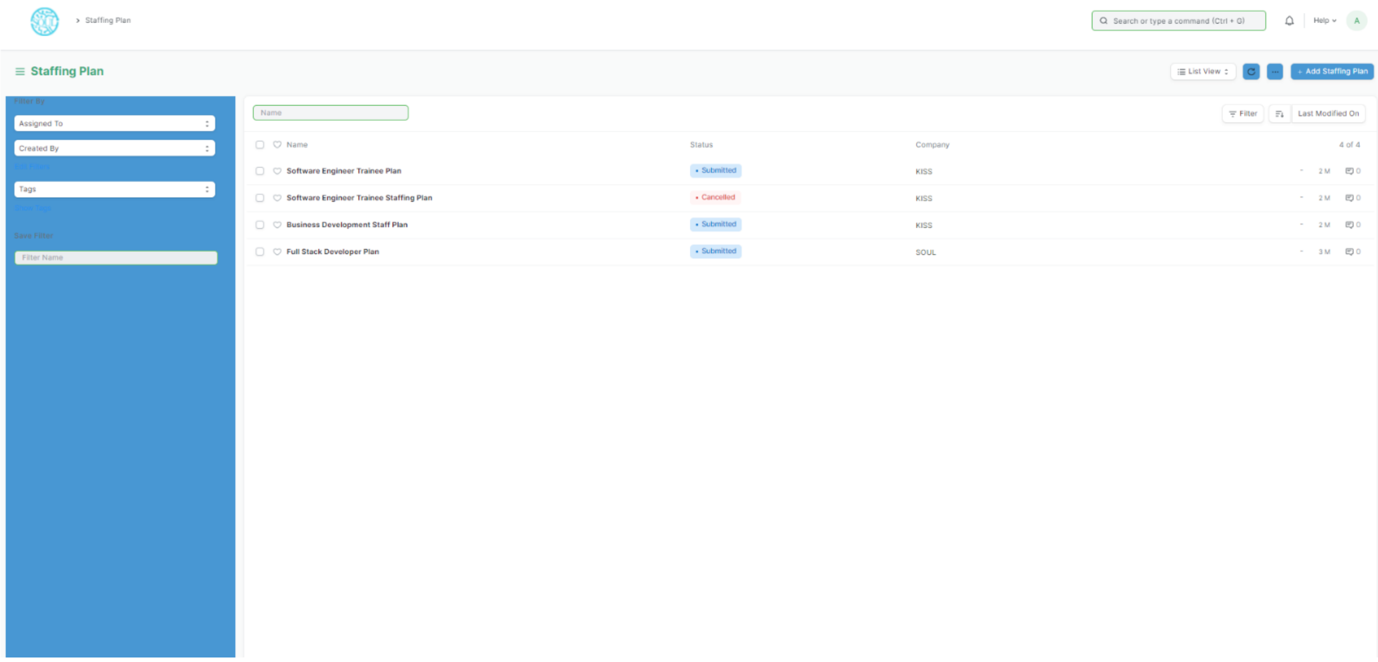
32.1 Prerequisites

Before creating a Staffing Plan, it is necessary you create the following:

- Department
- Designation

32.2 How to create a Staffing Plan

1. Go to Staffing Plan list, click on New.
2. Enter the Name, From and To Date and select the Department for which you want to create the Staffing Plan.
3. Enter the Staffing Plan Details such as Designation, Vacancies, Estimated Cost Per Position, Total Estimated Cost and Number of Positions.
4. Save and Submit.



32.3 Features

Some of the additional features in the Staffing Plan doctype are explained below:

- Designation: The designations for which the Staffing Plan is created.
- Number of Positions: The number of positions you plan to recruit for between the From and To Dates of the Staffing Plan.
- Current Count: This is the number of Employees already hired against the particular Designation.

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- Vacancies: The number of vacancies based on the Number of Positions you wish to recruit and the current Employee count.
- Estimated Cost Per Position: You can specify the cost to company per position so that hiring officials can stick to the budget.
- Total Estimated Budget: Once you enter the recruitment plan for all the designations, Staffing Plan will draw up the total estimated budget as per the plan.

32.4 Related Topics

1. Job Opening
2. Job Applicant
3. Job Offer

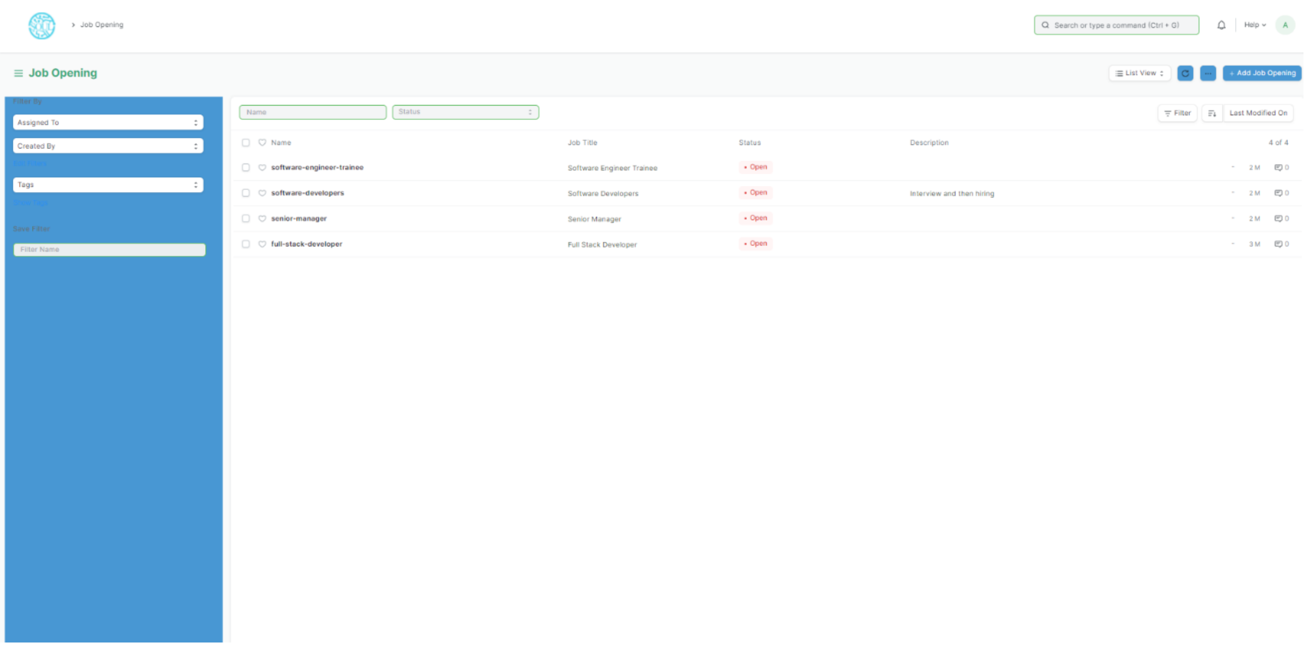
33. Job Opening

A Job Opening is a job vacancy in your Company. You can make a record of the open vacancies in your company using Job Opening.

EduLead allows to plan recruitments for your company. The number of Job Openings you can create for a Designation is restricted according to the vacancies planned by the Staffing Plan defined for the company or one of its parent group companies in the hierarchy.

Note: Make sure the "Check Vacancies On Job Offer Creation" checkbox is checked in the Hiring Settings section of the HR Settings.
To access Job Opening, go to:

Home > Human Resource > Recruitment > Job Opening



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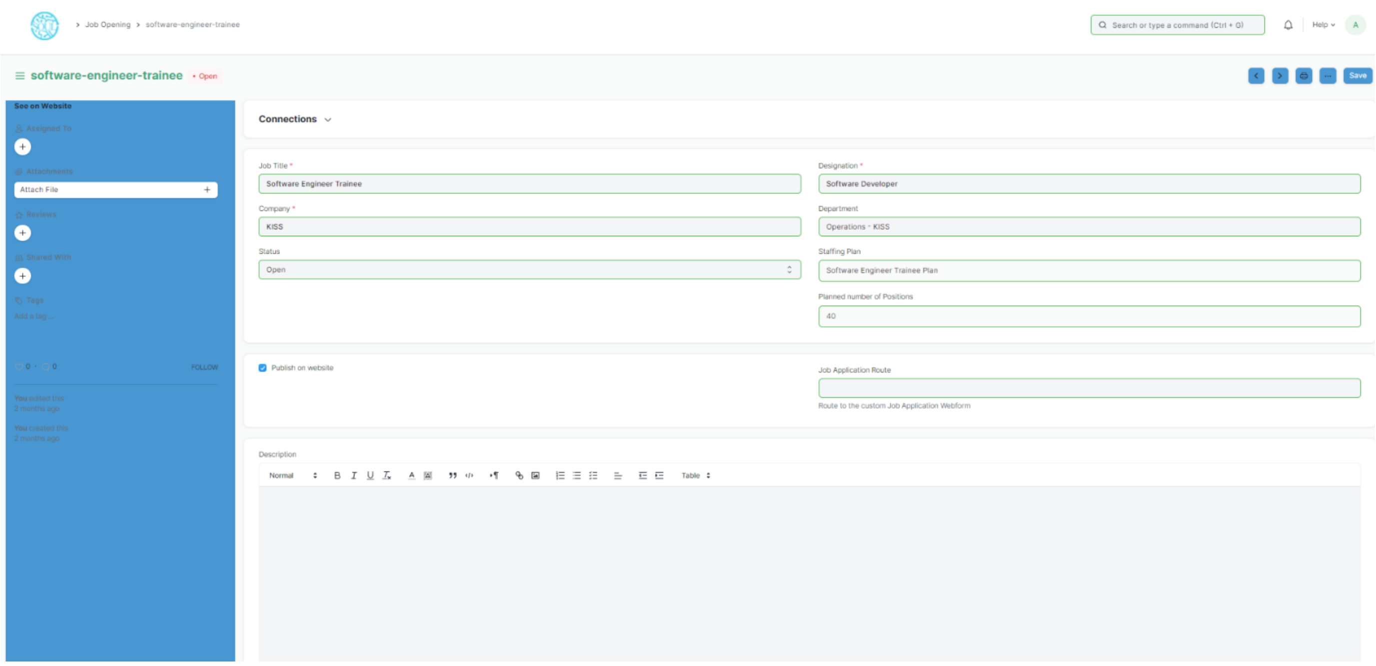
33.1 Prerequisites

Before creating a Job Opening, it is advisable you create the following:

- Staffing Plan
- Department

33.2 How to create a Job Opening

1. Go to Job Opening list, click on New.
2. Enter the Job Title.
3. Select the Designation and Department. Based on Designation selected, appropriate Staffing Plan and Planned Number of Positions will be fetched.
4. Save.



Once the Job Opening is saved, you can directly create a new Job Applicant from the dashboard.

Note: You can set the Status of the Job Opening as Open/Closed. Once a Job Opening is Closed, you cannot create a Job Applicant against it.

33.4 Related Topics

1. Job Applicant
2. Job Offer

EduLead allows to plan your recruitment at a group company level. The number of Job Openings you can create for a Designation is restricted according to the Vacancies planned by the Staffing Plan defined for the company or one of it's parent group companies in the hierarchy. To understand how you can do configure this, check Staffing Plan

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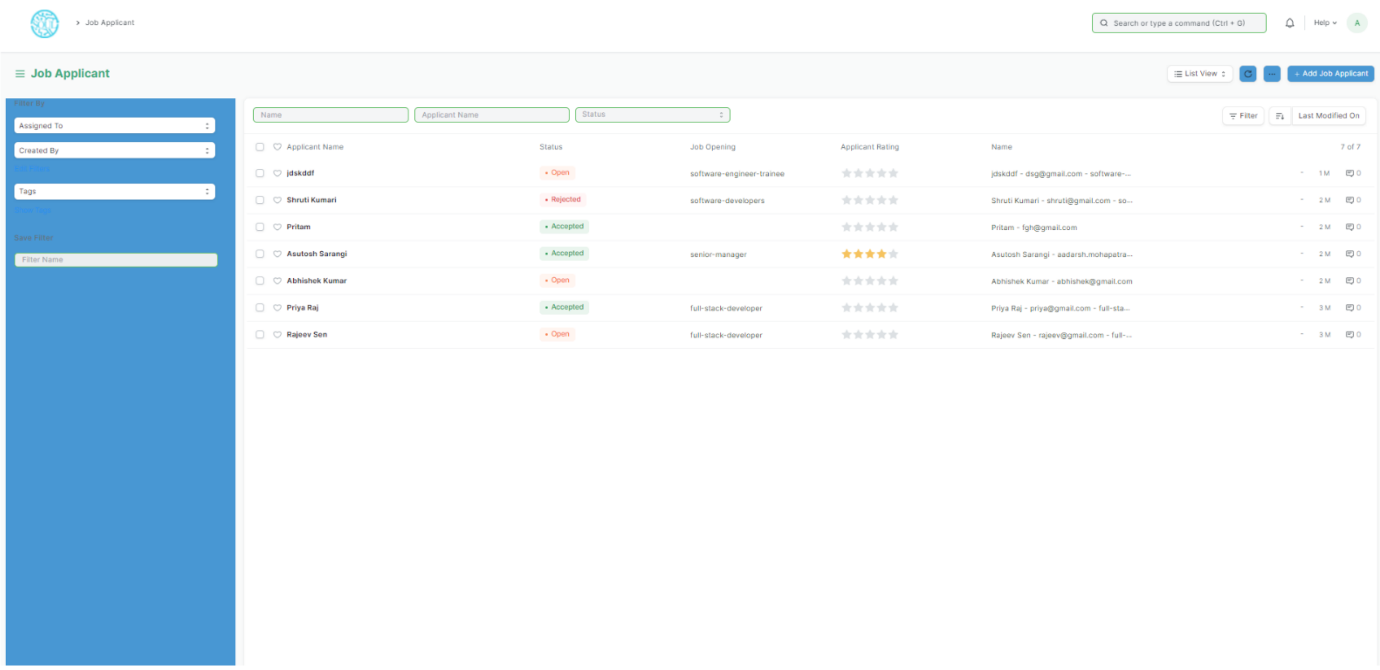
34. Job Applicant

A Job Applicant is a person who applies for a job in your Company against a particular Job Opening.
In EduLead, you can maintain a list of people who have applied against a particular Job Opening.
To create a Job Applicant, go to:

Home > Human Resource > Recruitment > Job Applicant



34.1 Prerequisites

Before creating a Job Applicant, it is advisable you create the following:

- Staffing Plan
- Department
- Job Opening

34.2 How to Create a Job Applicant

1. Go to Job Applicant list, click on New.
2. Enter Applicant Name and Email Address.
3. Select Job Opening.
4. Select Source (Campaign, Employee Referral, Walk In, Website Listing).

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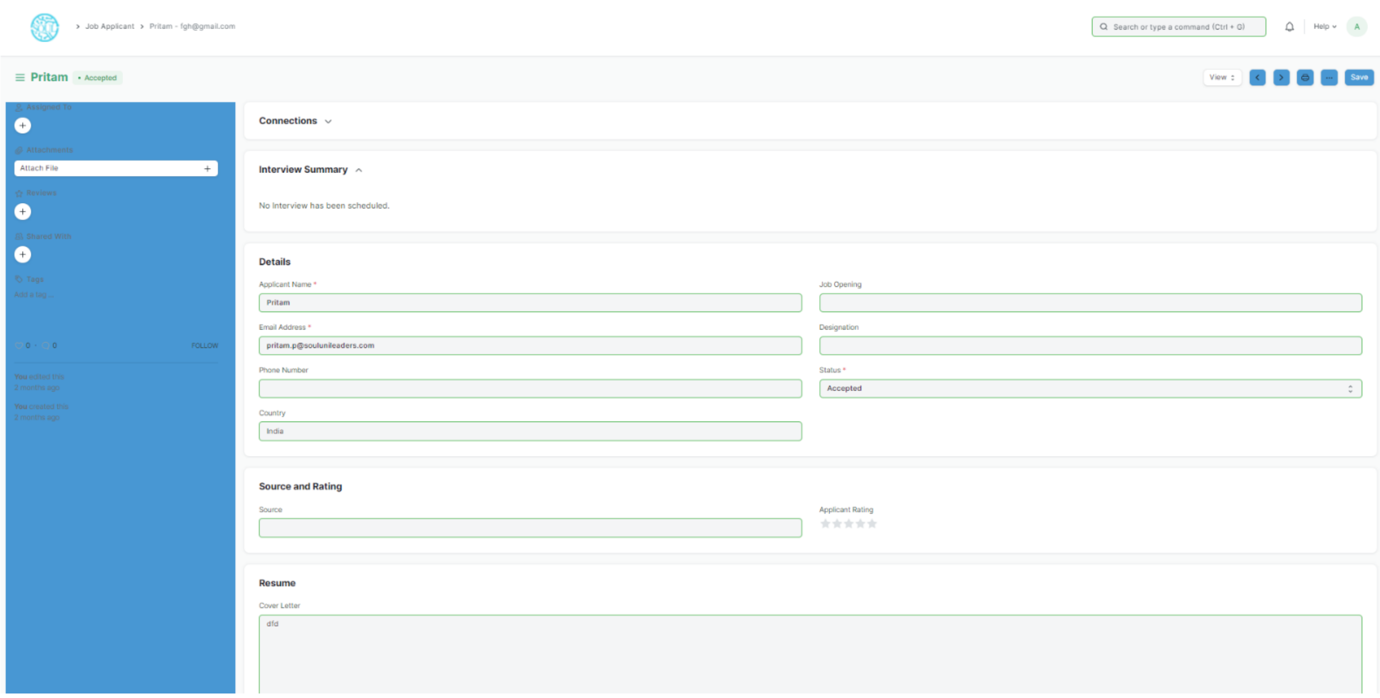


Note: If you select the Source as Employee Referral, you will have to select the Employee name in the Source Name Field.

34.3 Features

34.3.1 Linking with an Email Account

You can link Job Application with an Email account. Suppose you link Job Application with an email job@example.com, the system will create a New Job Applicant against each email received on the mailbox.

- To link Email Account with Job Applicant, go to:

Settings > Email Account > New Email Account

- Enter the Email Address and the password, and select 'Enable Incoming'
- In 'Append To' select 'Job Applicant'

34.4 Related Topics

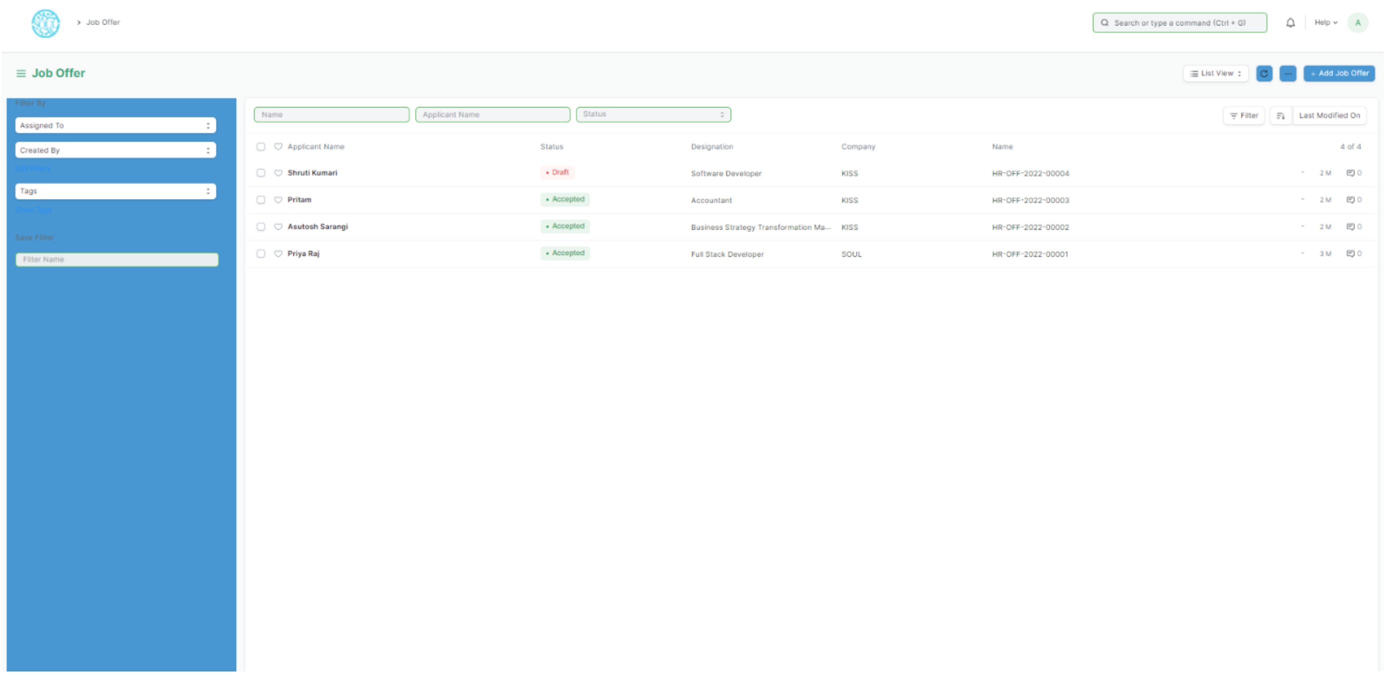
1. Job Offer
2. Employee

35. Job Offer

Job Offer is given to selected candidates after interview and selection which states the offered salary package, designation, grade, department, number of days entitled for leave among other information.

In EduLead you can make a record of the Job Offers that you can give to candidates. To access Job Offer, go to:

Home > Human Resource > Recruitment > Job Offer



35.1 Prerequisites

Before creating a Job Offer, it is advisable to create the following:

- Staffing Plan
- Job Applicant
- Job Opening

35.2 How to Create a Job Offer

1. Go to Job Offer list, click on New.
2. Select the Job Applicant, Offer Date and Designation.
3. Set the Status of the Job Offer (Awaiting Response, Accepted, Rejected).
4. Save and Submit.

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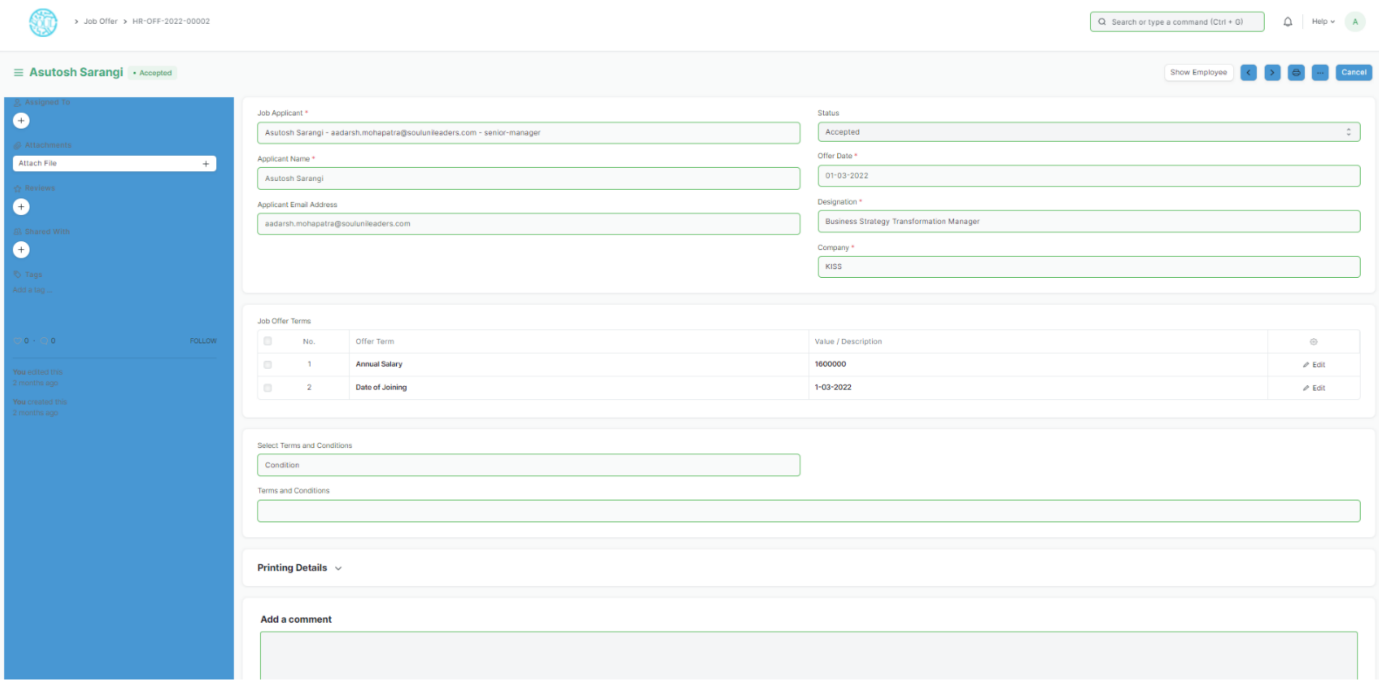

Note: A Job Offer can be made only against a Job Applicant

35.6 Features

35.6.1 Job Offer Terms

In this section, you can enter the Job Offer Term such as job description, notice period, incentives, leaves per year, etc. and specify its Value/ Description.

35.6.2 Select Terms and Conditions

All the Terms and Conditions related to the Job Offer can be specified in this section. To do this, create a new Terms and Conditions template and link it to the Job Offer.

35.6.3 Printing Details

You can create a pre-designed print format to print you Job Offer. To do so, select the Letter Head and Print Heading in the Printing Details section.

36. Appointment Letter

The letter written by the employer requesting the selected candidates to join in a specific position.
In EduLead you can create an Appointment Letter that you can give to candidates. To access Appointment Letter, go to:

Home > Human Resource > Recruitment > Appointment Letter

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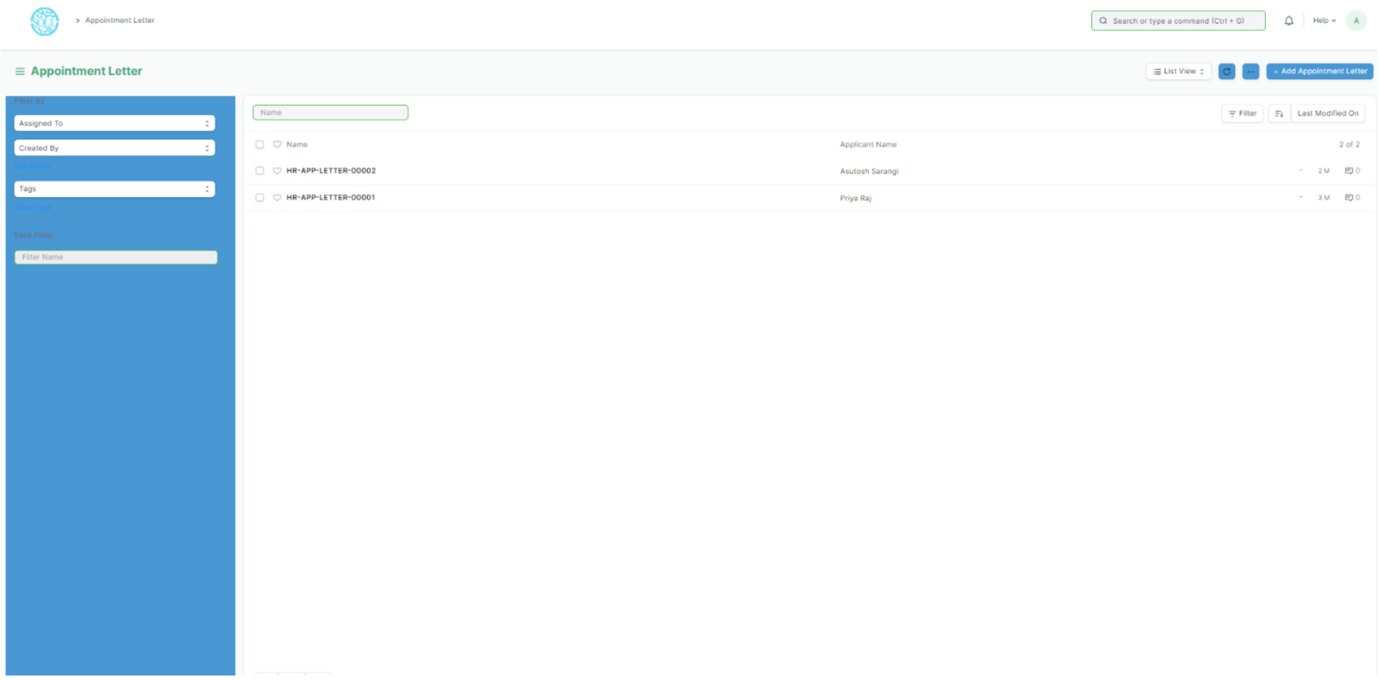

36.1 Prerequisites

Before creating an Appointment Letter, it is advisable to create the following:

- Job Applicant

36.2 How to Create an Appointment Letter

1. Go to an Appointment Letter list, click on New.
2. Select the Job Applicant and Appointment Date.
3. You can manually fill Introduction, Terms and, Closing Statement or select an Appointment Letter Template to autofill the content. You can create new Appointment Letter Templates to select them easily.
4. Click on Save.
5. After saving, go to the Print View to view and save the PDF of the Appointment letter.

Note: Appointment Letter can be made only against a Job Applicant

36.3 Features

36.3.1 Appointment Letter Template

1. Go to Appointment Letter Template list, click to New.
2. Fill Introduction, Terms and, Closing Statement.

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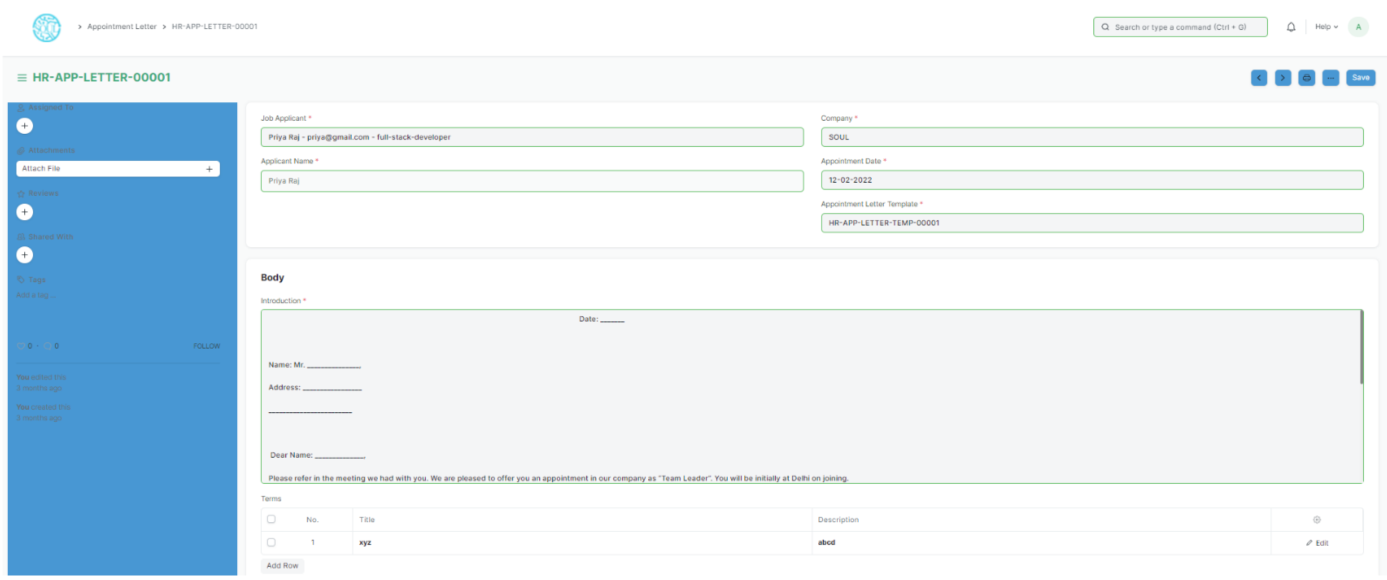
3. Click on Save.

Note On selecting Appointment Letter Template in Appointment Letter, it autofills the content.

36.3.2 Print Format

You can create new or use existing standard print formats.



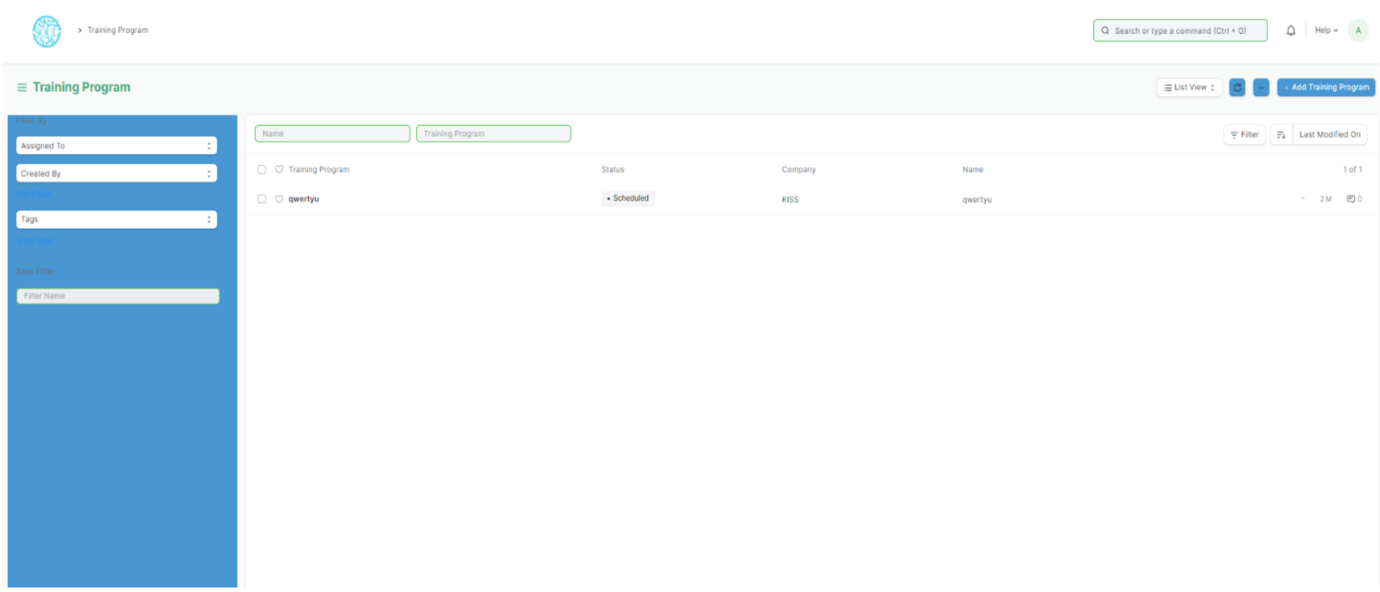
37. Training Program

Training Program defines programs designed for training employees or other individuals in specific skills.

In EduLead, you can create a Training Program and schedule Training Events under it.

To access Training Program, go to:

Home > Human Resources > Training > Training Program



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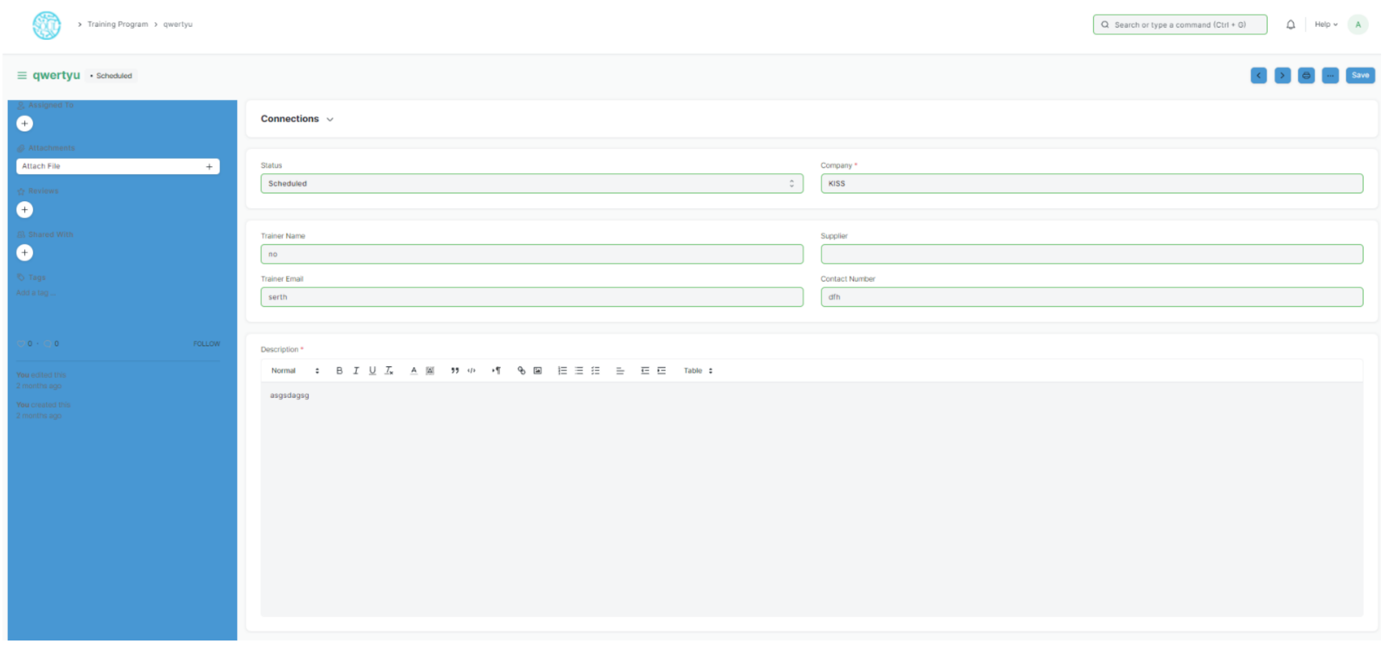
37.1 How to create a Training Program

1. Go to Training Program list, click on New.
2. Enter the Training Program name.
3. Enter the Trainer Name, Trainer Email and Contact Number.
4. Select the Supplier (optional) in case an outside vendor/expert was called to conduct the training.
5. Additionally, you can also write a short description of the Training Program in the Description box (optional).



Note: By default, the Status of the Training Program is 'Scheduled'. However, you can change the status to 'Completed' or 'Cancelled' as per the requirement.
Once the Training Program is saved, you can create Training Events under the same.

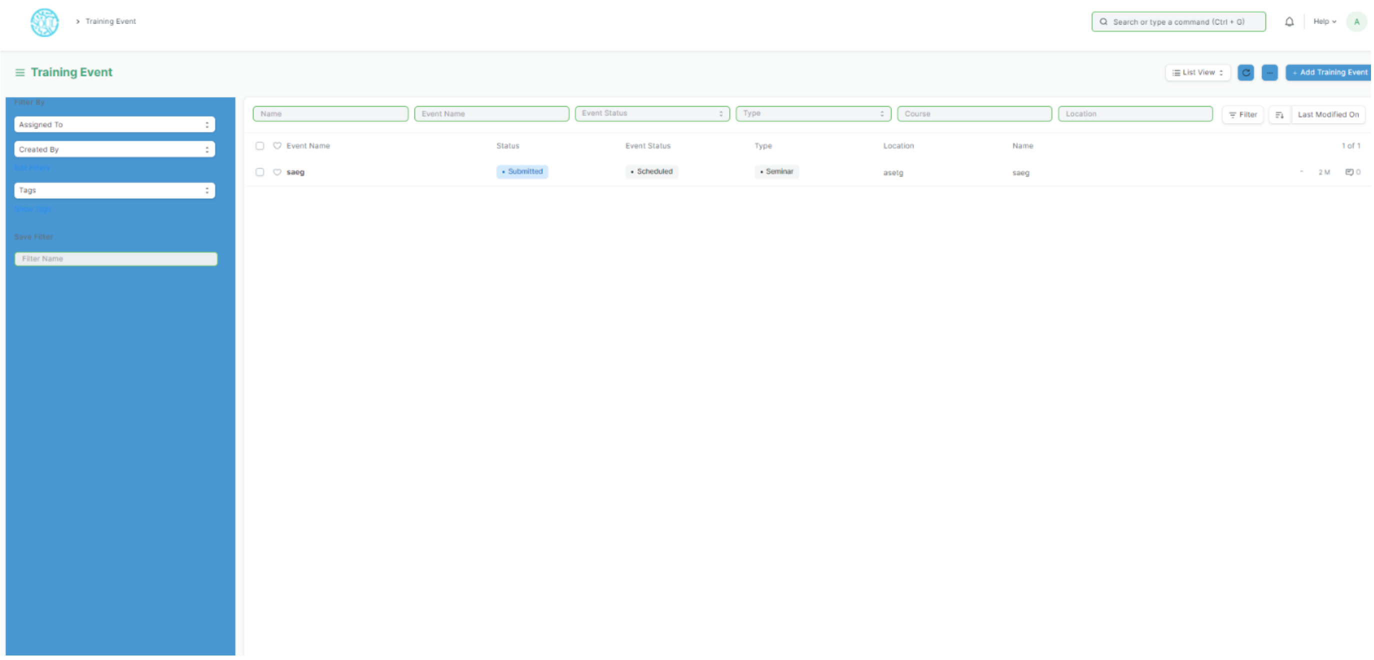
37.2 Related Topics

1. Training Event
2. Training Result
3. Training Feedback

38. Training Event

Training Event allows you to schedule seminars, workshops, conferences, etc. under a Training Program.
You can also invite your employees to attend the event using this feature.
To access Training Event, go to:

Home > Human Resources > Training > Training Event



38.1 Prerequisites

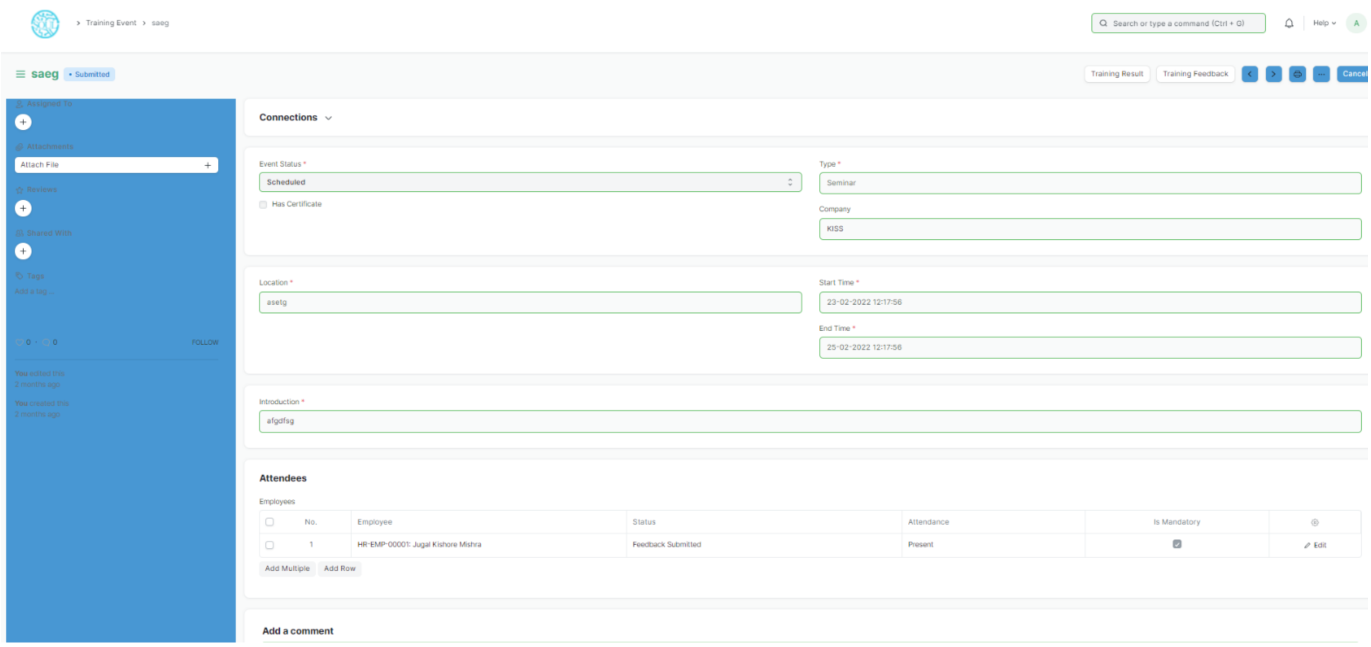
Before creating a Training Event, it is advisable you create the following documents:

- Training Program
- Employee

38.2 How to create a Training Event

1. Go to the Training Event list, click on New.
2. Enter the Event Name.
3. Select the Event Type.
4. Select Event Level (Beginner, Intermediate, Expert).
5. Enter the Trainer Name, Email and Contact Number.
6. Select the Event Course. Enter the Start Time, End Time and Location of the Training Event.
7. Additionally, you can also write a short description of the Event in the Description box.
8. Save and Submit.

   Note: Check the 'Has Certificate' checkbox if the Training Event is a certified course.



38.3 Features

38.3.1 Inviting Employees for the Event

You can invite your employees to attend the Training Event. You can do so by selecting the employees to be invited in the Employees table.

By default, the status of the employee will be 'Open'.

When you submit the Training Event, a notification will be sent to the employee notifying that the Training has been scheduled. This is sent via Email Alert "Training Scheduled". You can modify this Email Alert to customize the message.

38.4 Related Topics

1. Training Result
2. Training Feedback
3. Course `

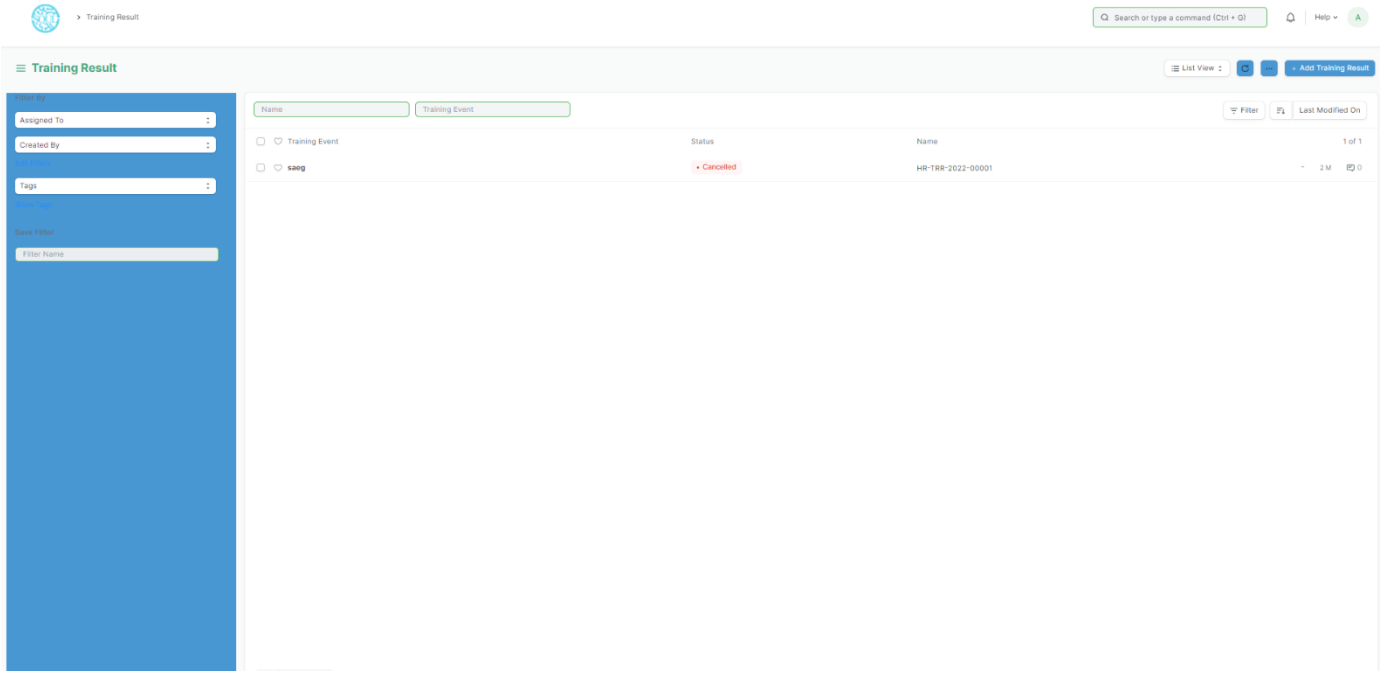
39. Training Result

After completion of the training event, employee-wise training results can be stored based on the evaluation done by the trainer.

EduLead allows you to create training results and share it with the employees with the Training Result doctype.

To access Training Result, go to:

Home > Human Resources > Training > Training Result



39.1 Prerequisites

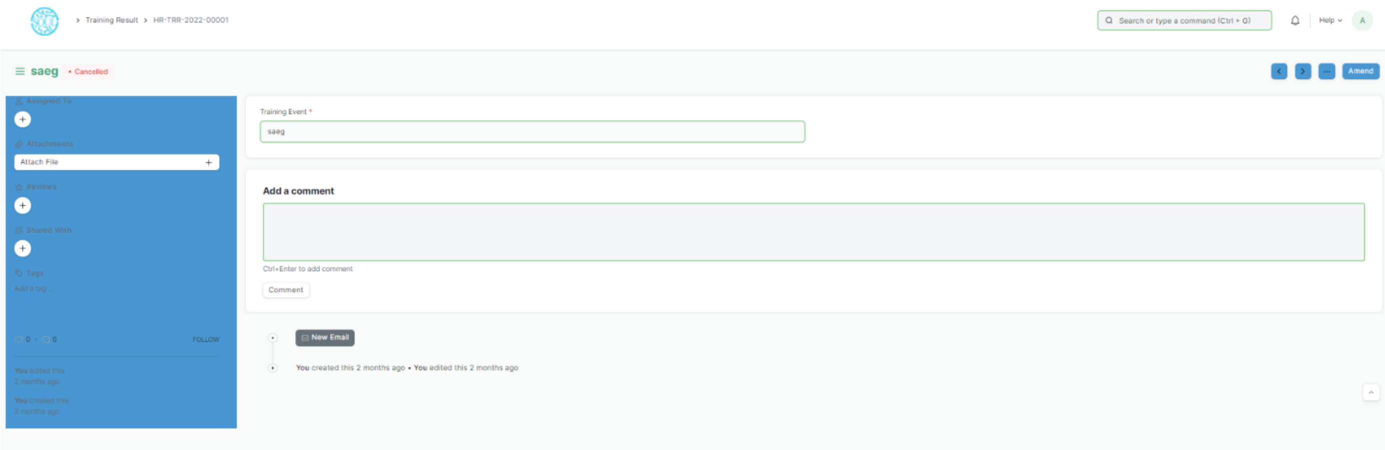
Before creating a Training Result, it is advisable you create the following documents:

- Training Program
- Training Event
- Employee

39.2 How to create a Training Result

1. Go to the Training Result list, click on New.
2. Select Training Event.
3. Enter the Hours, Grade and Comments against the Employee Name.
4. Save and Submit

When the Training Result is submitted, all the employees will receive an email notifying them that they must share their feedback via Training Feedback. This is also managed via an Email Alert, so you can customize this alert too.



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Note: You can also access Training Result directly from the Training Event dashboard.

39.3 Related Topics

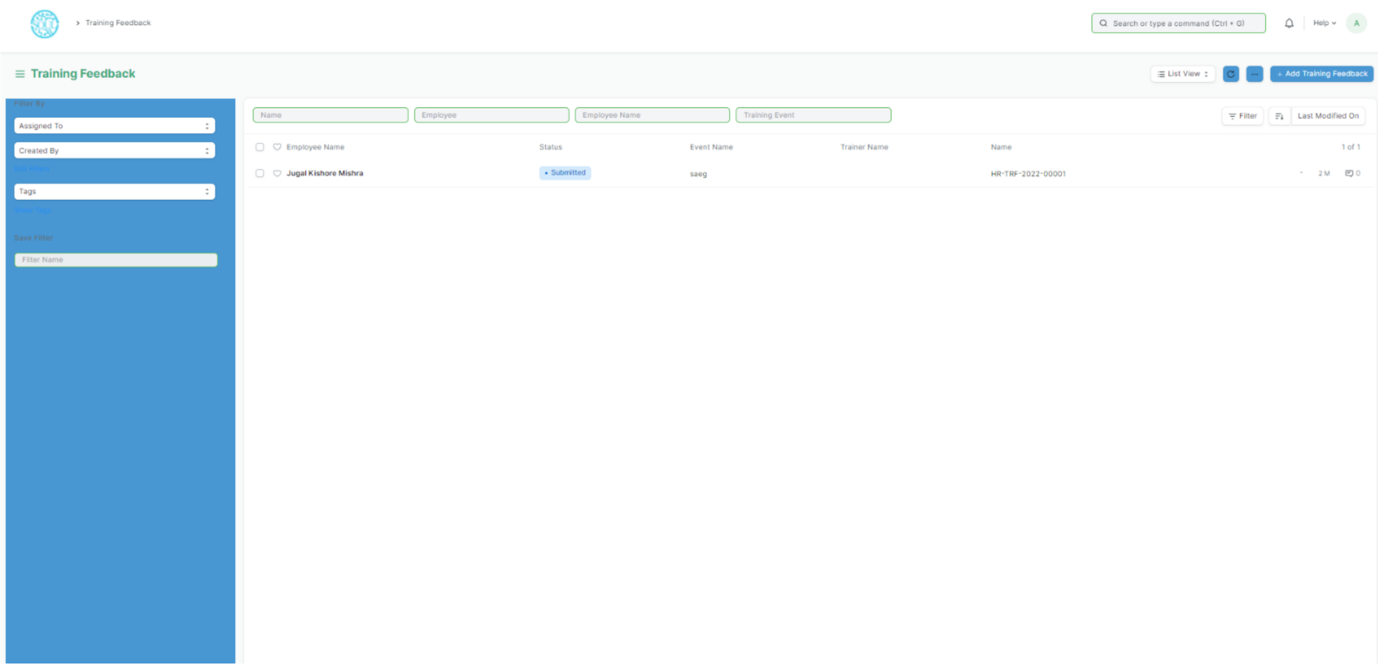
1. Training Feedback

40. Training Feedback

Once the Training is complete, employees can share their feedback via Training Feedback.

To access Training Feedback, go to:

Human Resources > Training > Training Feedback



40.1 Prerequisites

Before creating a Training Event, it is advisable you create the following documents:

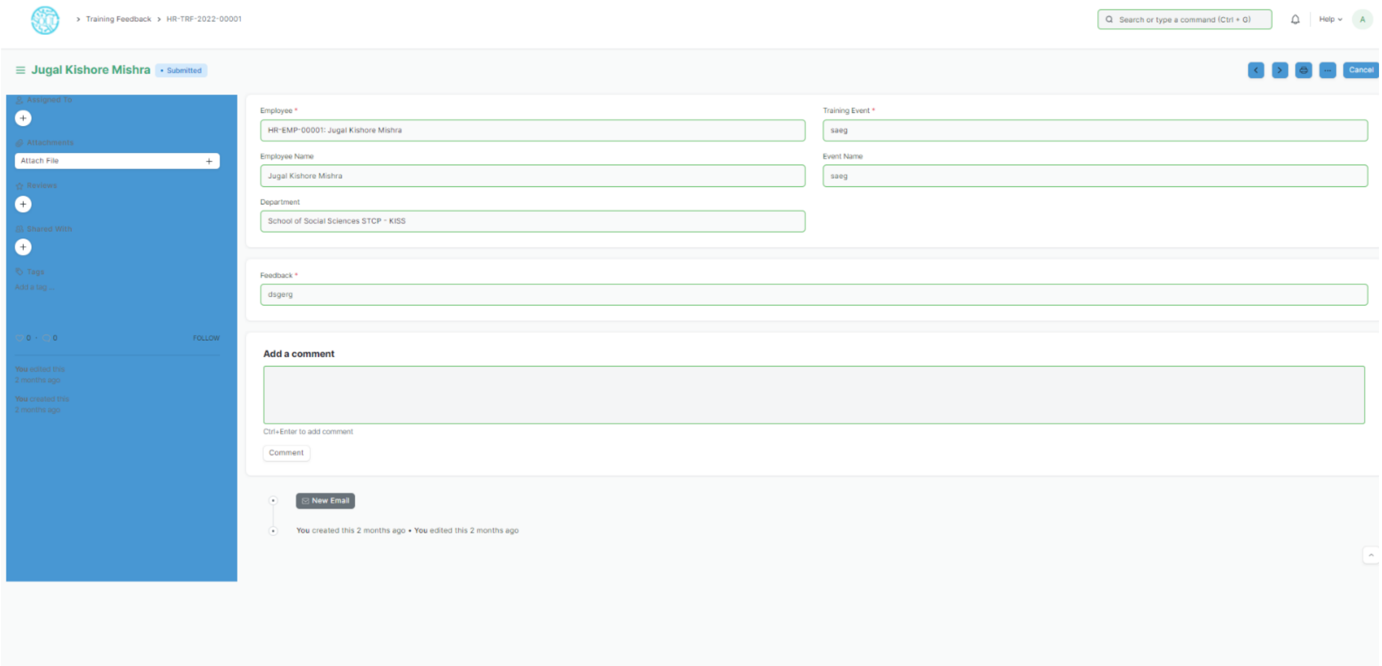
- Training Program
- Training Event
- Employee

40.2 How to create a Training Feedback

1. Go to the Training Feedback list, click on New.
2. Select the Employee.

3. Select the Training Event. Based on that, the corresponding Event Name, Course and Trainer Name will get fetched.
4. Enter the feedback in the Feedback box.
5. Save and Submit.

Note: You can also access Training Feedback directly through the Training Event dashboard.



40.3 Related Topics

1. Training Result

41. Employee Lifecycle Management

Employee Lifecycle Management relates to the various stages an Employee goes through during the employment with an organization. It is important for most enterprises' HR departments to keep records of these changes that the employees go through across the company. EduLead simplifies these HR activities, read the following sections to understand how.

41.1 Topics

1. Employee Onboarding
2. Employee Promotion
3. Employee Separation
4. Employee Transfer
5. Employee Skill Map

42. Employee Onboarding

In the process of hiring an Employee, there are set of standard activities which need to be executed. This feature helps you to maintain the masters of these activities, and create a set of tasks at the time of each Employee hiring.

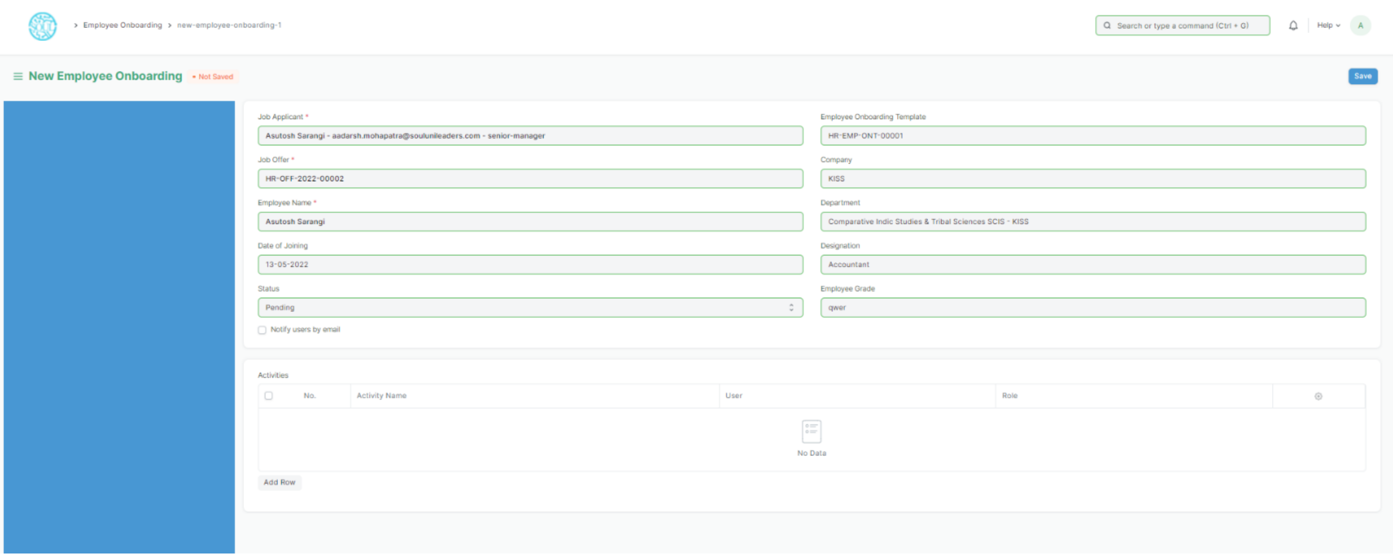
Employee Onboarding is created for a Job Application, who is approved for the hiring.

Use Case: Let's assume that following are the activities which need to be performed as soon as a job applicant is approved to be hired.

- Perform a legal and professional background check
- Create an Employee master
- Create an Email Account
- Create an identity card
- Allocate leaves

In EduLead, these standard activities can be tracked in the Employee Onboarding Template. To access Employee Onboarding, go to:

Human Resources > Employee Lifecycle > Employee Onboarding



42.1 Prerequisites

Before creating an Employee Onboarding, it is advisable that you create the following documents:

- Job Applicant
- Employee
- Department
- Designation
- Employee Grade

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42.2 How to create an Employee Onboarding

1. Go to: Employee Onboarding > New.
2. Select the Job Applicant. once the Job Applicant is selected, the corresponding Employee will automatically get fetched.
3. Select the Employee Onboarding Template. Based on the template selected, information such as Department, Designation and Employee grade will be automatically fetched (if already mentioned in the Onboarding Template).
4. Enter Date of Joining.
5. Save and Submit.

Note 1: If an Employee Onboarding Template isn't created, you can directly fill the onboarding information in the Employee Onboarding doctype itself.
Note 2: The 'Status' of the Employee Onboarding will change to Completed once all the associated Activities are complete.

42.3 Features

42.3.1 Employee Onboarding Template

The Employee Onboarding Template is a blueprint which contains a predefined list of Activities for Employee Onboarding. An Employee Onboarding Template can be created for a particular Department, Designation and Employee Grade.
To create a new Employee Onboarding Template:

1. Go to: Human Resources > Employee Lifecycle > Employee Onboarding Template > New.
2. Enter the Department, Designation and Employee Grade (optional).
3. Mention the Activities for onboarding. For each Activity, you can also mention the User or Role, or one of it, to whom this Activity will be assigned.
4. You can also schedule the Onboarding Activities by specifying the Begin On (Days) i.e., when the activity has to start and the Duration (in Days) for the same.

42.3.2 Tasks and Assignments

On submission of the Employee Onboarding, a Project will be created. Within the Project, Tasks will also be created for each Activity. If you have set the date and duration against activities, tasks will be created with appropriate Start and End Date excluding holidays.
You can view the created Projects and Tasks as shown below:
Additionally, each Activity can be assigned weights based on its importance.
Based on the progress on the Tasks, progress can be updated in the Employee Onboarding process.

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42.3.3 Employee Creation

You can directly create an Employee through the Employee Onboarding doctype (if not already created) once all the mandatory onboarding tasks are complete.

42.4 Related Topics

1. Employee Promotion
2. Employee Separation
3. Employee Transfer

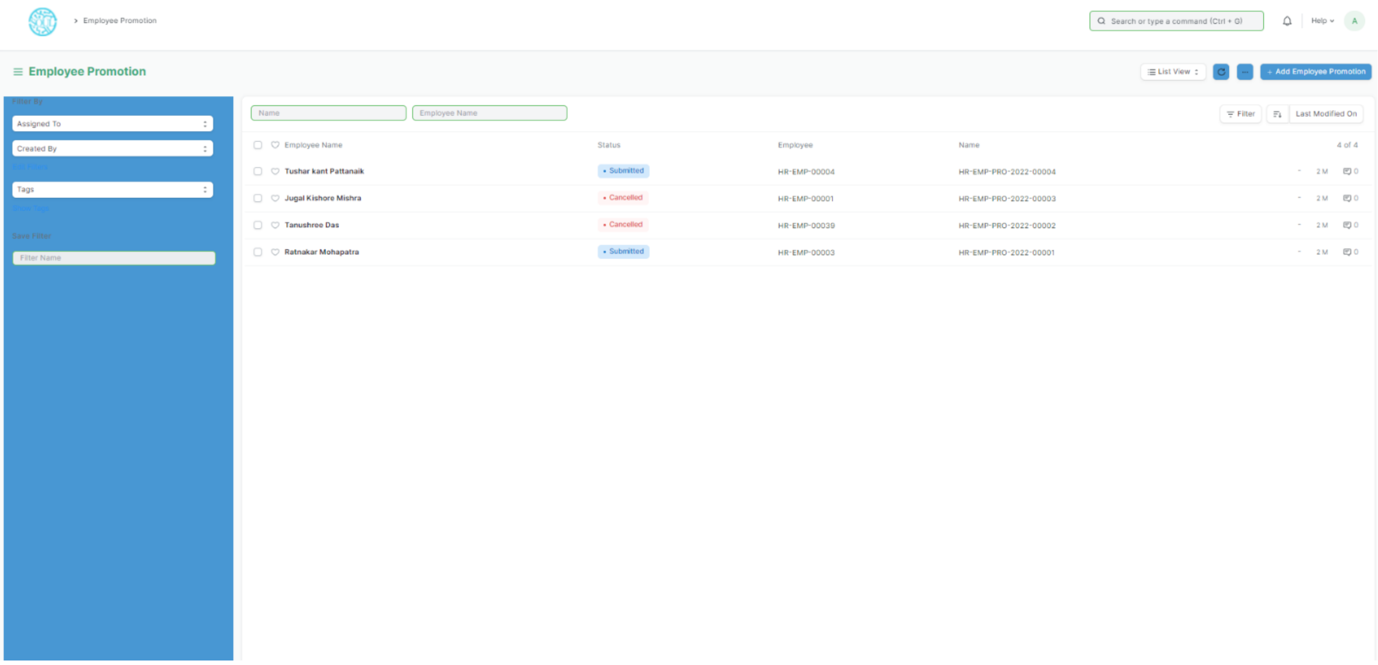
43. Employee Promotion

Promotion or career advancement is a process through which an Employee of a company is given a higher share of duties, a higher pay-scale or both.

In EduLead, you can manage Employee Promotion and its various associated activities using this document.

To access Employee Promotion, go to:

Human Resources > Employee Lifecycle > Employee Promotion



43.1 Prerequisites

Before creating an Employee Promotion, it is advisable that you create the following documents:

- Employee
- Department

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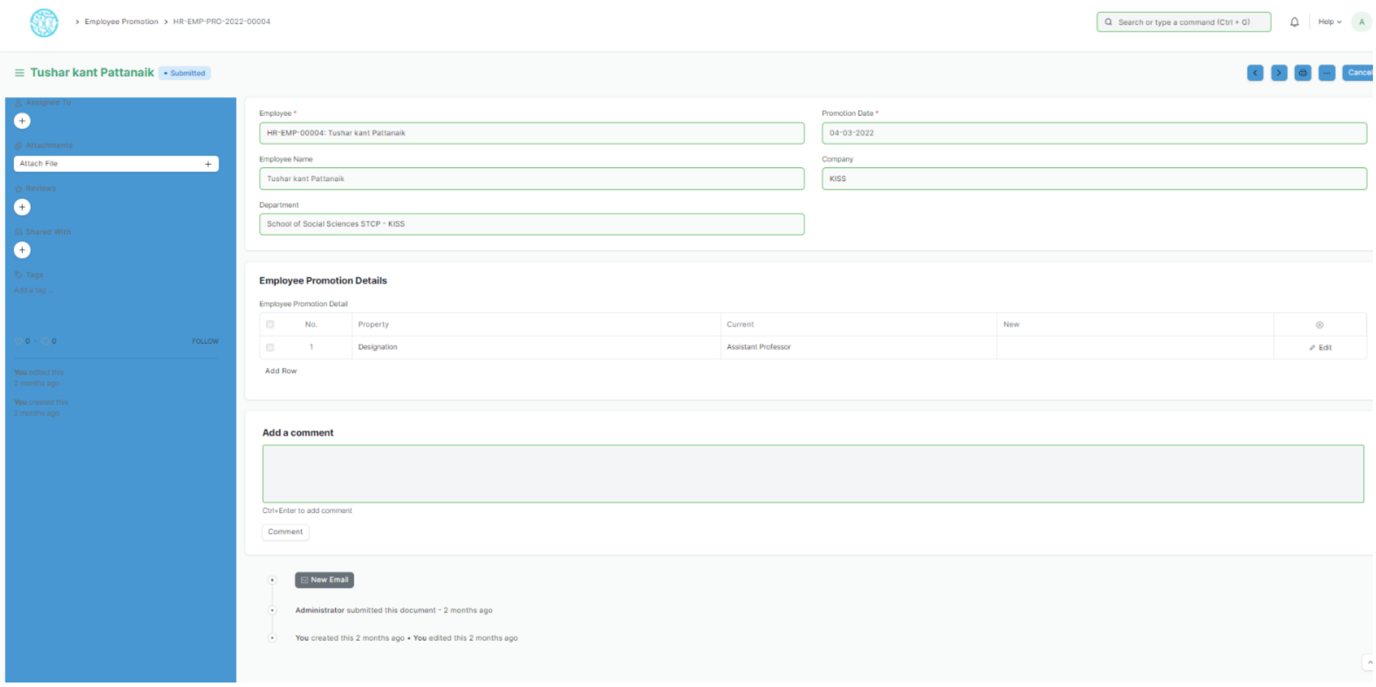
43.2 How to create an Employee Promotion

1. Go to: Employee Promotion > New.
2. Select the Employee.
3. Enter the Promotion Date.

4. In the Employee Promotion Detail table, select the Property and set the Current and New value.



Note: Promotion document can be submitted on or after Promotion Date. Once submitted all the changes added to Promotion Details table will be applied to the Employee. EduLead also keeps a record of all promotions of the Employee in the Employment History table in Employee document.

43.3 Related Topics

1. Employee Onboarding
2. Employee Separation
3. Employee Transfer

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44. Employee Separation

Employee Separation is a situation when the service agreement of an Employee with his/her organization comes to an end and the Employee leaves the organization.

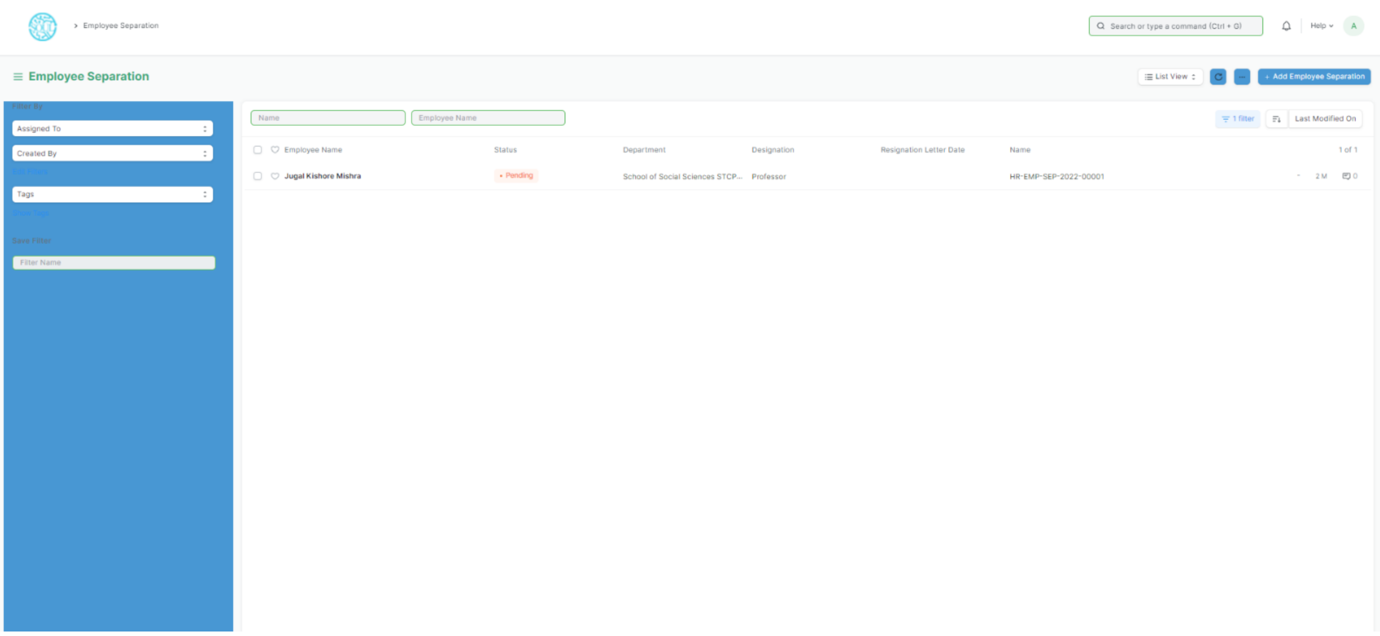
Employee Separation is created for an Employee who has resigned or terminated from the organization.

Use Case: Let's assume that following are the activities which need to be performed as soon as an Employee needs to be separated from the organization.

- Collect laptop
- Clear dues
- Delete Employee Email Account
- Collect identity card

In EduLead, these standard activities can be tracked in the Employee Separation Template. To access Employee Separation, go to:

Human Resources > Employee Lifecycle > Employee Separation



44.1 Prerequisites

Before creating an Employee Separation, it is advisable that you create the following documents:

- Employee
- Department
- Designation
- Employee Grade

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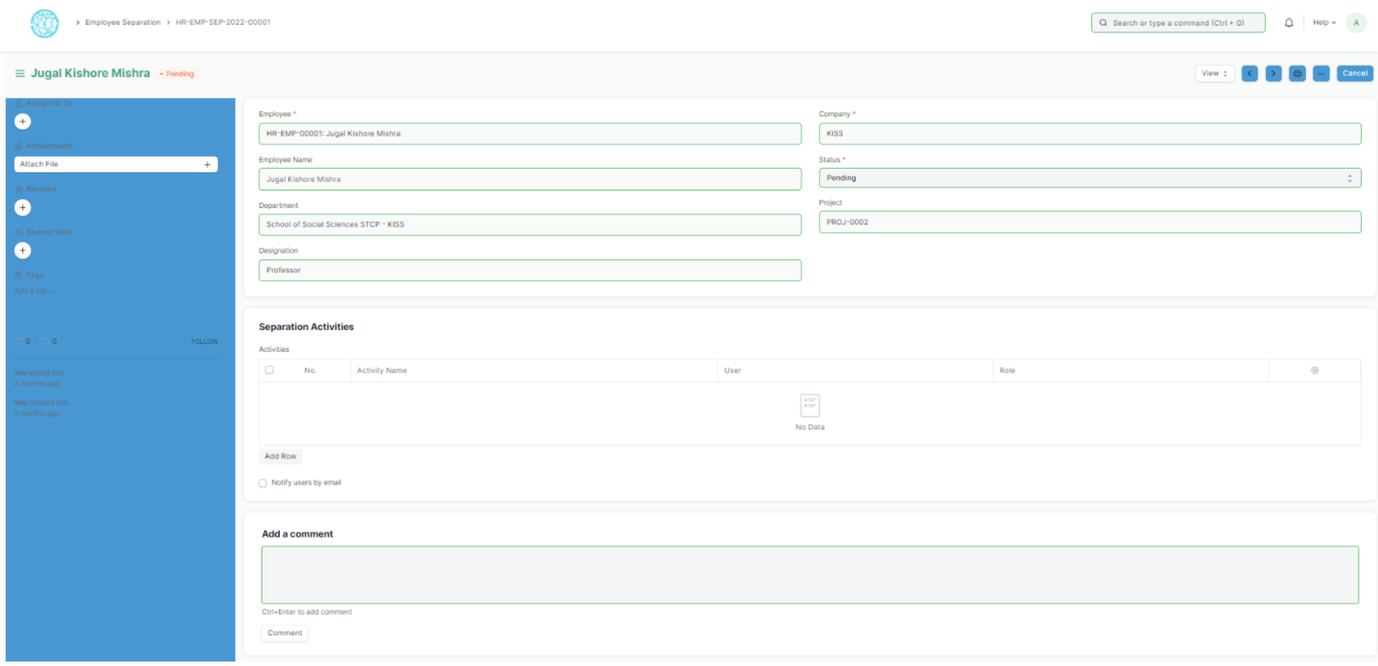
44.2 How to create an Employee Separation

1. Go to: Employee Separation > New.
2. Select the Employee. Once the Employee is selected, the corresponding Employee information such as Department, Designation and Employee Grade will automatically get fetched.
3. Select the Employee Separation Template. Based on the template selected, information such as Department, Designation and Employee grade will be automatically fetched (if already mentioned in the Separation Template).
4. Enter the Resignation Letter Date.
5. Additionally, you can also enter the Exit Interview Summary.
6. Save and Submit.



Note 1: If an Employee Separation Template isn't created, you can directly fill the separation information in the Employee Separation doctype itself.
Note 2: The 'Status' of the Employee Separation will change to Completed once all the associated Activities are complete.

44.3 Features

44.3.1 Employee Separation Template

The Employee Separation Template is a blueprint which contains a predefined list of Activities for Employee Separation. An Employee Separation Template can be created for a particular Department, Designation and Employee Grade.

To create a new Employee Separation Template:

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1. Go to: Human Resources > Employee Lifecycle > Employee Separation Template > New.
2. Enter the Department, Designation and Employee Grade (optional).
3. Mention the Activities for separation. For each Activity, you can also mention the User or Role, or one of it, to whom this Activity will be assigned.
4. You can also schedule the Separation Activities by specifying the Begin On (Days) i.e. when the activity has to start and the Duration (Days) for the same.

44.3.2 Tasks and Assignments

On submission of the Employee Separation, a Project will be created. Within the Project, Tasks will also be created for each Activity. If you have set the date and duration against activities, tasks will be created with appropriate Start and End Date excluding holidays. You can view the created Projects and Tasks through View > Project/ Tasks. Additionally, each Activity can be assigned weights based on its importance.
Based on the progress on the Tasks, progress can be updated in the Employee Separation process.

44.3.3 Employee Status

You can directly view the separated Employee through the Employee Separation doctype through View > Employee once the form is submitted.

44.4 Related Topics

1. Employee Onboarding
2. Employee Promotion
3. Employee Separation

45. Employee Transfer

Employee Transfer is a form of internal mobility, in which the Employee is shifted from one job to another usually at a different location, department, or unit.
In EduLead, you can record Employee transfers to different Company or Department by using the Employee Transfer document.
To access Employee Transfer go to:

Human Resource > Employee Lifecycle > Employee Transfer

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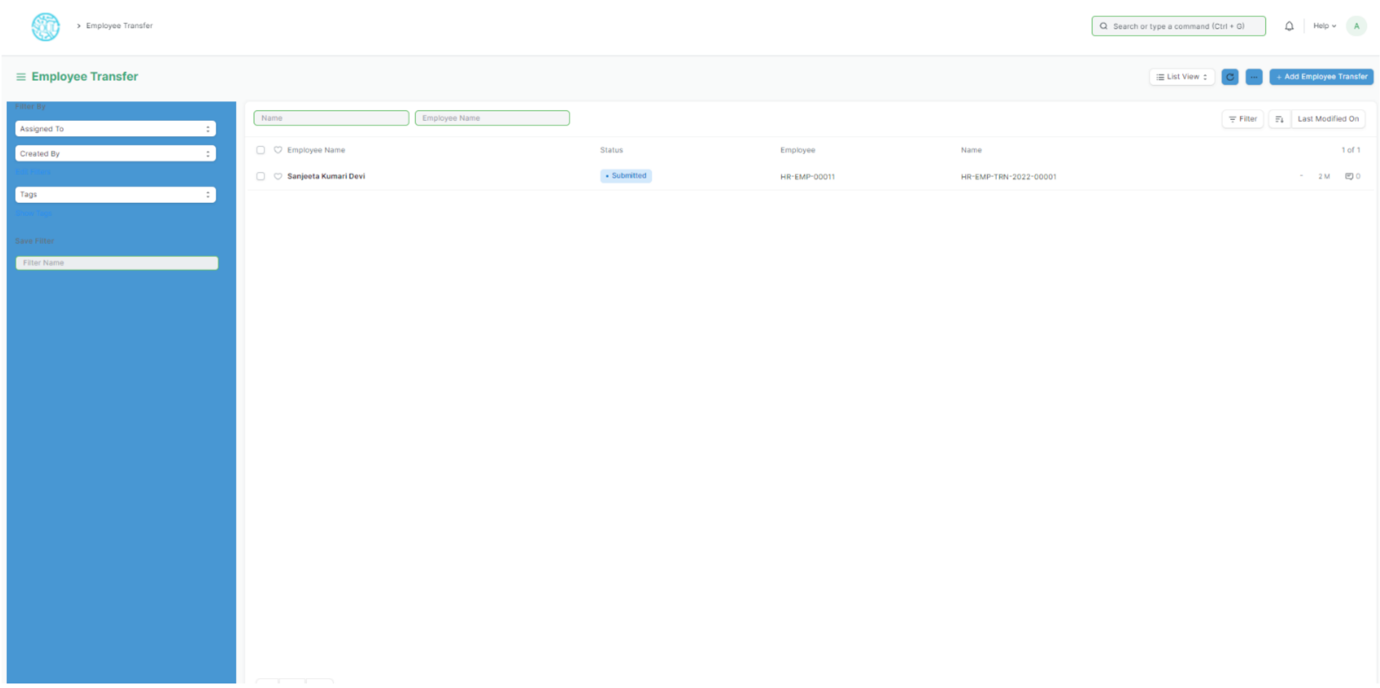

45.1 Prerequisites

- Employee
- Department

45.2 How to create a Employee Transfer

1. Select the Employee.
2. Select the Transfer Date.
3. Select the New Company in case the Employee is transferred to a different company (optional).
4. In the Employee Transfer Details table, select the Property and set the Current and New value.
5. Additionally, 'Create New Employee' checkbox can be checked to create a new Employee ID for the transferred Employee.

Note: If Create New Employee ID is checked, a new Employee will be created with property changes in Transfer Details table and old Employee will be marked as relieved. Leave allocations for the new Employee has to be manually created from Leave Period.

Note: Transfer document can be submitted on or after Transfer Date. Once submitted all the changes added to Transfer Details table will applied to Employee.

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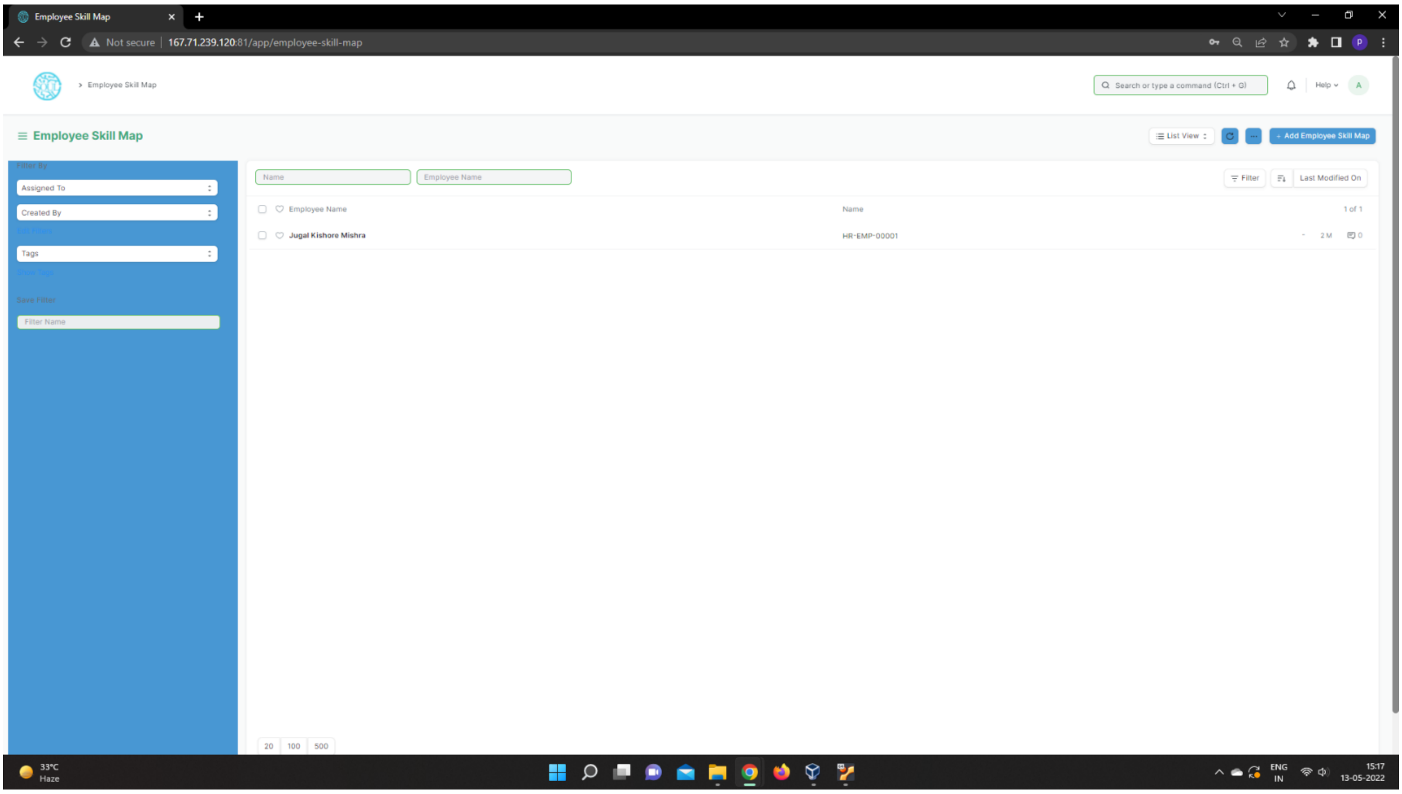

45.3 Related Topics

1. Employee Onboarding
2. Employee Separation
3. Employee Promotion

46. Employee Skill Map

Employee Skill Map is a record which helps your organization track your Employee's skill sets and trainings. It can be used to rate each skill of the Employee and track their growth after each internal training. This data can be used at the time of appraisals.

To record an Employee Skill Map go to:

Home > Human Resource > Employee Lifecycle > Employee Skill Map

Make sure you have set the required Skills for designations from the Skill doctype.

Example of Skills for a Designation:

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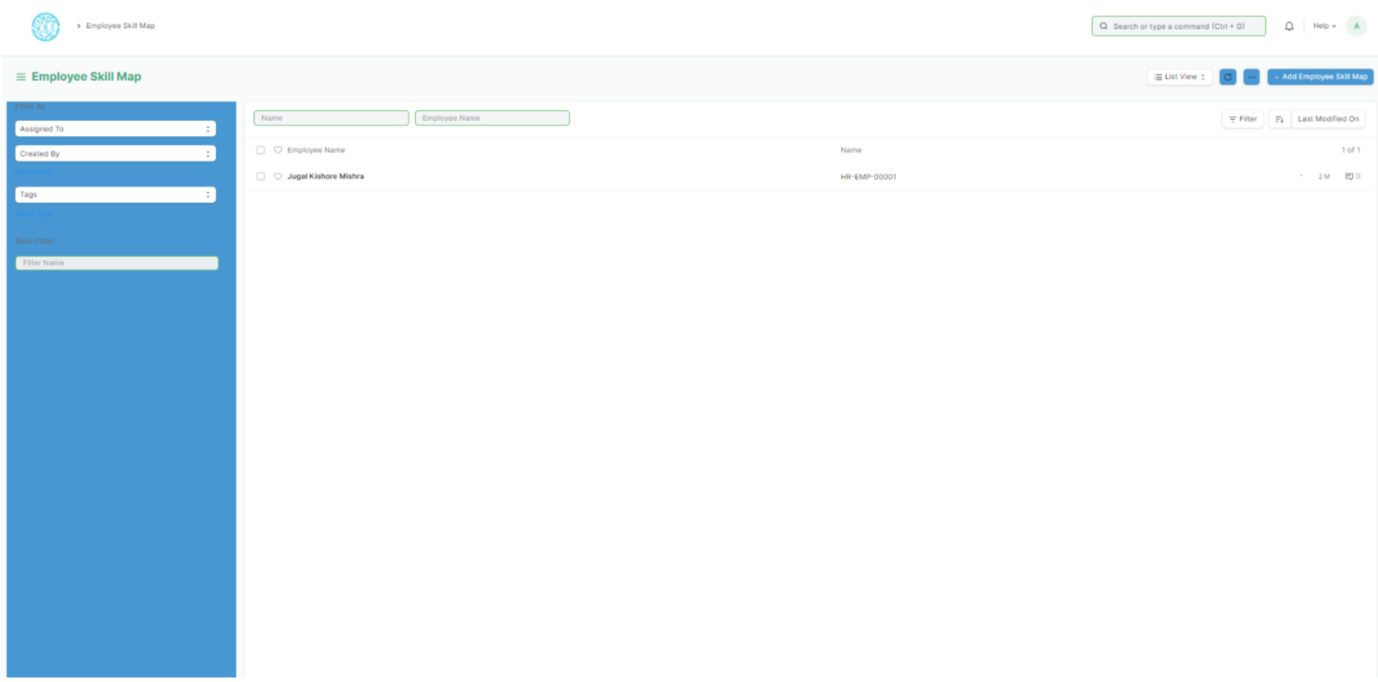

46.1 How to create an Employee Skill Map

1. Go to the Employee Skill Map list, click on New.
2. Select the Employee.
3. Based on the designation of the Employee system will pull the Skills. Set the Proficiency level out of 5, and the Evaluation Date.
4. If the Employee is lacking in any skill, you can schedule trainings for the Employee.
5. Under the Trainings table, select the Training Event and the Training Date.
6. Save.

47. Travel Request

Employees can request funds for official travel using Travel Request. To create a new Travel Request, go to

Human Resource > Travel and Expense Claim > Travel Request > New Travel Request

You can also mention the Travel Itinerary as well as the costs involved for the trip. Employees can also check Travel Advance Required if they wish to receive any upfront payment form the company.

48. Employee Advance

Sometimes employees go outside for company's work and company pays some amount for their expenses in advance. This is when the employee can create an Employee Advance form where details such as the Purpose of Expense and Expense Amount can be recorded.

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Once the Employee Advance is created by the Employee, the Expense Approver can submit the advance record after verification. After Employee Advance gets submitted, the accountant releases the payment and makes the Payment Entry.

To access Employee Advance, go to:

Human Resources > Expense Claims > Employee Advance

48.1 Prerequisites

1. Employee
2. Department
3. Chart of Accounts

48.2 How to create an Employee Advance

1. Go to: Employee Advance > New.
2. Select Employee to whom you need to give the advance.
3. Enter the Purpose and Advance Amount.
4. Select the Advance Account and Mode of Payment.
5. Save.

Note: The Employee can only Save the Employee Advance but cannot Submit it. It can be only submitted by the Expense Approver.

48.3 Features

48.3.1 Employee Advance Submission

Employee Advance record can be created by any Employee but they cannot submit the record. After saving Employee Advance, Employee should Assign document to Approver. On assignment, approving user will also receive email notification. To automate email notification, you can also setup Email Alert.

After verification, the Expense Approver can Submit (Accept) the Employee Advance form or Reject the request.

48.3.2 Make Payment Entry

a. Employee Advance via Payment Entry

After submission of Employee Advance record, accounts user will be able to create a Payment Entry using the 'Create' button.

The Payment Entry will look like following:

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b. Employee Advance Payment via Journal Entry

Alternatively, a Journal Entry can also be created against the Employee Advance.

Note: Make sure the Party Type is selected as Employee and the Reference Type is selected as Employee Advance.

c. Employee Advance is Paid

On submission of the Payment Entry/Journal Entry, the paid amount and status will be updated in Employee Advance record.

48.3.3 Adjust Advances on Expense Claim

Later when the employee claims the expense, an advance record can be fetched in the Expense Claim and linked to the claim record.

48.3.4 Return Amount

When advance is paid to an Employee, there are three situations:

- The amount may be unused
- All of it may be used
- Some part may be used

Create the Employee Advance, create a payment entry to indicate that the amount is paid.

- If amount is unused, click on the Return button to return the paid Advance amount
- If all of the advance is used, it will reflect in the Claimed Amount field
- If only some amount is claimed and rest is returned, the returned amount will be shown in the 'Returned Amount' field.

48.4. Related Topics

1. Expense Claim

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49. Expense Claim

Expense Claim is made when employees make expenses out of their pocket on behalf of the company.

For example, if they take a customer out for lunch, they can make a request for reimbursement via the Expense Claim form.

To access an Expense Claim, go to:

Human Resources > Expense Claims > Expense Claim

49.1 Prerequisites

1. Employee
2. Department
3. Chart of Accounts

49.2 How to create a Expense Claim

1. Go to: Expense Claim > New.
2. Select the Employee Name in the 'From Employee' field.
3. Select the Expense Approver.
4. Enter the Expense Date, Expense Claim Type and the Amount.
5. Additionally, you can also enter the Expense Taxes and Charges.
6. In Accounting Details, select the Company's Default Payable Account.
7. Save and Submit.

Set the Employee ID, date, the list of expenses, and corresponding taxes that are to be claimed and "Submit" the record.

49.2.1 Approving Expenses

Approver for the Expense Claim is selected by an Employee himself. Employee can choose from the list of users who are configured as *Expense Approvers* for their Department.

When a new Expense Claim is created, if the selected expense approver does not have access to it, the document is shared with the approver with "submit" permission.

After saving Expense Claim, Employee should Assign document to Approver. On assignment, approving user will also receive email notification. To automate email notification, you can also setup Email Alert

Expense Claim Approver can update the "Sanctioned Amounts" against Claimed Amount of an Employee. If submitting, Approval Status should be submitted to Approved or Rejected. If

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Approved, then Expense Claim gets submitted. If rejected, then Expense Approver's comments can be added in the Comments section explaining why the claim was approved or rejected.

49.2.2 Booking the Expense

On submission of Expense Claim, system books an expense against the expense account and the employee account

User can view unpaid expense claim using report "Unclaimed Expense Claims"

49.2.3 Payment for Expense Claim

To make payment against the expense claim, user has to click on Create > Payment.

Payment Entry

Note: This amount should not be clubbed with Salary because the amount will then be taxable to the Employee.

Alternatively, a Payment Entry can be made for an employee and all outstanding Expense Claims will be pulled in.

Accounting > Payment Entry > New Payment Entry

Set the Payment Type to "Pay", the Party Type to Employee, the Party to the employee being paid and the account being paid from. All outstanding expense claims will be pulled in and payments amounts can be allocated to each expense.

49.2.4 Linking with Task & Project

- To Link Expense Claim with Task or Project specify the Task or the Project while making an Expense Claim

This will update the Project cost with the Expense claim amounts

50. Loan Type

Loans can be categorized into different types based on their specific characteristics.

In EduLead, you can define different Loan Types, their Rate of Interest and other related information in the Loan Type doctype.

To access Loan Type go to:

Human Resources > Loans > Loan Type

50.1 How to create a Loan Type

1. Go to: Loan Type.
2. Enter the Loan Name.
3. Enter the Rate of Interest (%) Yearly.
4. Optionally, you can also enter the Maximum Loan Amount and Description of the Loan Type.

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5. Save.

50.2 Related Topics

1. Loan Application
2. Loan

51. Loan Application

Loan Application is a document which contains the information regarding the Loan Applicant, Loan Type, Repayment Method, Loan Amount and Rate of Interest.

Employee can apply for loan by going to:

Human Resources > Loan > Loan Application

51.1 Prerequisites

Before creating a Loan Application, it is advisable to create the following documents:

- Employee
- Loan Type

51.2 How to create a Loan Application

1. Go to: Loan Application > New.
2. Enter the Applicant name.
3. Enter loan information such as a Loan Type, Loan Amount and Required by Date.
4. Select the Repayment Method and based on loan information, information such as Total Payable Amount and Interest will be calculated.
5. Save and Submit.

51.3 Features

51.3.1 Repayment Method

There are two types of Repayment Methods in Loan Application:

1. Repay Fixed Amount Per Period

- Enter the Monthly Payment Amount.
- Save.
- Once saved, based on the Rate of Interest, the Total Payable Interest and Total Payable Amount will be calculated along with Period in Months.
- Submit.

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2. Repay Over Number Of Periods

- Enter the Repayment Period in Months.
- Save.
- Once saved, based on the Rate of Interest, the Total Payable Interest and Total Payable Amount will be calculated along with Monthly Repayment Amount.
- Submit.

51.4 Related Topics

1. Loan Type
2. Loan

52. Loan

Once the Loan Application is approved by the manager, a Loan record and repayment schedule can be created for the Applicant using the Loan.
To access Loan, go to:

Human Resources > Loans > Loan

52.1 Prerequisites

Before creating a Loan record, it is necessary that you create the following documents:

- Loan Type
- Loan Application
- Chart of Accounts

52.2 How to create a Loan record

1. Go to: Loan > New.
2. Select the Applicant name.
3. Select the Loan Application. Once selected, loan information such as Loan Type, Loan Amount, Rate of Interest, Repayment Method, Repayment Period in Months and Monthly Repayment Amount will be fetched.
4. Enter Repayment Start Date.

5. Enter Account Information such as Mode of Payment, Payment Account, Loan Account and Interest Income Account.
6. Save. Once saved, a Repayment Schedule is automatically generated. The first repayment payment date would be set as per the "Repayment Start Date".

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Note: Check "Repay from Salary" if the loan repayment will be deducted from the salary

You can alternatively create a Loan record directly from Loan Application.

52.3 Features

52.3.1 Creation of Disbursement Entry

After submitting the Loan document, if the status is "Sanctioned", you can click on "Create Disbursement Entry" to create a Journal Entry of the Loan.

52.3.2 Loan repayment deduction from Salary

To auto deduct the Loan repayment from Salary, check "Repay from Salary" in Loan. It will appear as Loan Repayment in Salary Slip.

52.3.3 Extending the Loan

Loan amount is deducted from the salary. If the employee is on leave without pay for some period, the existing loan can be extended without the need for creating a new loan. This can be done be editing the Repayment Schedule table even after submitting the loan.

52.4 Related Topics

1. Journal Entry
2. Payroll Entry

53. Fleet Management

Fleet Management section of Human Resources helps your Organization manage their fleet of vehicles and track their expenses.

To use Fleet Management in EduLead, you can do the following:

1. Set Up a Vehicle.
2. Enter Vehicle Logs regularly.
3. Make Expense Claims for Vehicle Expenses.
4. View Reports for Vehicle Expenses.

53.1 Related Topics

1. Vehicle
2. Vehicle Log

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54. Vehicle

The Vehicle document allows you to define the different types of Vehicles in your Organization. It acts as the Vehicle Master for Fleet Management.

To access the Vehicle master, go to:

Human Resources > Fleet Management > Vehicle

54.1 How to create a Vehicle document

1. Go to Vehicle list, click on New.
2. Enter information such as License Plate, Make (Brand) and Model.
3. Enter Odometer value (Last).
4. Enter other additional details such as Fuel Type ad Fuel UOM.
5. Save.

54.2 Features

Apart from the aforementioned mandatory features, some additional features that can be captured in the Vehicle master are as follows:

54.2.1 Additional Vehicle Details

Additional Vehicle details such as Chassis No., Acquisition Date, Vehicle Value (Amount), Location, Employee managing the Vehicle and Insurance details can be captured in the Vehicle master.

54.2.2 Vehicle Attributes

Additionally, Vehicle attributes like Color, Wheels, Door, Last Carbon Check, Fuel Type and UOM can be saved in the Vehicle master.

54.3 Related Topics

1. Vehicle Log

55. Vehicle Log

Vehicle Log is used to enter Odometer readings, Fuel Expenses and Service Expense details.
To access Vehicle Log, go to:

Human Resources > Fleet Management > Vehicle Log

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55.1 Prerequisites

Before creating a Vehicle Log, it is necessary that you create the following documents:

- Vehicle

55.2 How to create a Vehicle Log

1. Go to Vehicle Log list, click on New.
2. Select License Plate and Employee.
3. Enter Odometer Reading information such as Date and Odometer (reading).
4. Enter Refueling Details [optional] such as Fuel Qty, Fuel Price, Supplier and Invoice Ref.

5. Additionally, Vehicle Service Details can also be added as shown (optional).
6. Save.

Once the information is saved, the Model and Make values will be automatically fetched.

55.3 Features

Fleet Management in EduLead allows you to automatically create an Expense Claim against your Vehicle Expenses.

55.3.1 Make Expense Claim against Vehicle Expenses

Click on Make Expense Claim button. This button appears only in case of Submitted Vehicle Logs.

When you click on 'Make Expense Claim',

1. The Date, Employee, Expense total are fetched over to the created Expense Claim.
2. The sum of Fuel Expenses and Service Expenses is calculated and fetched over to Expense Claim Amount.
3. Employee can submit the Expense Claim for further processing.

55.4 Related Topics

1. Expense Claim

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56. Human Resource Setup

The HR module has a setup process where you create the masters for all the major activities.

56.1 Organization Setup

To setup your Employee master you must first create:

- Employment Type (like Permanent, Temp, Contractor, Intern etc).
- Branch (if there are multiple offices).
- Department (if any, like Accounting, Sales etc).
- Designation (CEO, Sales Manager etc).
- Grade (A, B, C etc, usually based on seniority).

Check Setup for more details on each of masters, global *HR Settings* and other configurations.

56.2 Leave Setup

To setup Leaves, create:

- Leave Type (like Sick Leave, Travel Leave etc)
- Holiday List (list of annual holidays for the year - these days will not be considered in Leave Applications)
- Leave Policy to effectively track and manage Employee leaves across the company

You can read Leaves for a detailed description about how you can configure and manage Leaves.

56.3 Payroll (Salary) Setup

In EduLead, salaries have two types of components, earnings (basic salary, expenses paid by the company, like telephone bill, travel allowance etc) and deductions (amounts deducted for taxes, social security etc). You can create and assign salary structures to employees and EduLead simplifies most of the payroll processing for you.

Read more about setting up your payroll and how EduLead simplifies payroll processing in Salary and Payroll.

If you intend to configure EduLead to calculate Income Tax deductions automatically based on multiple Salary Slabs, Setting Up Income Tax Deduction will help you understand how you can set this up properly.

56.4 Recruitment

It is important for enterprises to plan their manpower recruitment for future periods. EduLead allows you to define recruitment plans at group company level. Subsidiary companies can create and publish job openings based on the group company plans, making it easy to manage your hiring process. To understand how you can set this up, check Staffing Plan

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If you have an active Staffing Plan, every time you create a new *Job Opening* EduLead will validate the open positions and current employment count with the Staffing Plan.

57. HR Settings

HR Settings allow global settings for HR-related documents.

To access HR Settings, go to:

Home > Human Resources > Settings > HR Settings

There are various settings available in the HR Settings.

57.1 Employee Settings

57.1.1. Retirement Age:

You can enter the retirement age (in years) for your employees.

57. 1.2 Employee Records to be created by

The naming for employee documents is based on the value selected in this field.

- Naming Series: The employee documents created will be named using the naming series selected in the 'Series' field.
- Employee Number: The Employee Number field becomes visible in selecting this field, and the naming of the employee document happens based on this field.
- Full Name: The employee document is named using the full name of the employee.

57.1.3 Stop Birthday Reminders

An email is sent to all the employees of the company when an employee has a birthday. To stop this email from being sent you can check this option.

57.1.4 Expense Approver Mandatory in Expense Claim

In Expense Claim Document the 'Expense Approver' field is set to mandatory on Check-in this option.

Payroll Settings will be part of HR Settings. Payroll Settings will be part of the new module, Payroll.

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57.2 Payroll Settings

57.2.1 Calculate Payroll Working Days Based On

Working Days in Salary Slip can be calculated based on Leave Application or Attendance records. You can select the option based on what you want to calculate working days.

57.2.2 Max working hours against Timesheet

For salary slips based on the timesheet, you can set the maximum allowed hours against a single timesheet. Set this value to zero to disable this validation.

57.2.3 Include holidays in Total no. of Working Days

If checked, the total number of working days will include holidays, and this will reduce the value of salary per day.

57.2.4 Disable Rounded Total

You can enable this to disable rounding off the total amount in salary slips.

57.2.5 Daily Wages Fraction for Half Day

Based on this fraction, the salary for Half Day will be calculated. For example, if the value is set as 0.75, the three-fourth salary will be given for half-day attendance.

57.2.6 Email Salary Slip to Employee

An email with the salary slip is sent to the respective employee's preferred email address on submission of the salary slip.

57.2.7 Encrypt Salary Slips in Emails

The salary slip PDF sent to the employee is encrypted using the mentioned Password Policy.

57.2.8 Password Policy

This field becomes visible and mandatory on Check-ing the above option for encrypting the salary slip in email.

Here is an example of how to set a Password Policy for the salary slip PDF.

Example:

```
SAL-{first_name}-{date_of_birth.year}
```

This will generate a password like SAL-Jane-1972

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57.3 Leave Settings

57.3.1 Leave Approval Notification Template

On creating or updating a leave application with a leave approver, an email is sent to this leave approver notifying about the new leave application. The email template used for this purpose can be selected here.

57.3.2 Leave Status Notification Template

On Submission/Cancellation of a leave application, the employee receives an email with the updated status of their leave application. The email template used for this purpose can be selected here.

57.3.3 Leave Approver Mandatory In Leave Application

In Leave Application document the 'Leave Approver' field is set to mandatory on Check-ing this option.

57.3.4 Show Leaves Of All Department Members In Calendar

The approved leaves of all employees in the same department are shown in the calendar view on Check-ing this option.

57.3.5 Auto Leave Encashment

If checked, the system generates a draft Leave Encashment record on the expiry of the leave allocation for all encashable Leave Types.

57.3.6 Restrict Backdated Leave Application

If checked, the system will not allow making a backdated leave application.

Introduced in version 13

57.3.7 Automatic Allocate Leaves Based On Leave Policy

If checked, leaves will be granted to the employees automatically based on the Effective From date as per the present Leave Policy Assignment.

57.4 Hiring Settings

57.4.1 Check Vacancies On Job Offer Creation

On the creation of a job offer for a particular position, vacancies present in the staffing plan for that position are checked to warn the user from over hiring for a particular position.

58. Daily Work Summary Group

In order to facilitate daily reporting of employees, you can configure EduLead to request employees to send their work summaries through email. Daily Work Summary is an automated way of getting the daily work reporting of employees in an organization.

To configure a new Daily Work Summary Group, go to:

Human Resources > Settings > Daily Work Summary Group

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You can set multiple groups with different set of 'Users' from your user list with different 'Send Emails At' time and with separate 'Holiday List' for each.

You can also choose to customize the 'Message' you send to users.

58.1 Prerequisites

Before creating a Daily Work Summary Group, it is necessary you create the following:

- Email Account

58.2 How to create a Daily Work Summary Group

1. Go to: Daily Work Summary Group > New.
2. Enter the name of the Daily Work Summary Group.
3. Enter the User's names in the 'Users' table.
4. Set the 'Send Emails At' time. This is the time the Daily Work Summary email will be sent.
5. Select Holiday List (optional). On these days, the Daily Work Summary email won't be sent.
6. In the Reminder section, enter the mail Subject and type in the Message.
7. Save.

Note:

1. If no Holiday List is selected, then the email will be sent every day.
2. Name of the "Daily Work Summary Group" will be sent as the title for daily summary email.
3. Mail will not be sent to the users of a disabled Daily Work Summary Group.

59. Setting Employee-wise Leave Approver

Use Case: Need to set up one Leave Approver per Employee.

Steps:

1) Go to the Employee's master.

2) In "Attendance and Leave Details" section, select the Leave Approver for that particular Employee.

3) Assign a Leave Policy to the Employee through the Employee master and Grant leaves through Leave Period.

4) Create a new Leave Application for the Employee. The system automatically fetches the Leave Approver set for that particular Employee.

Note: In case you have set a Department for that Employee, and Leave Approvers are also set in that particular Department, then those Leave Approvers will also be fetched in the Leave Application. However, the default Leave Approver will always be the one set in the Employee master.

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For example, a Leave Approver is set in the Department.

Now, if an Employee belonging to this Department creates a Leave Application, all the Leave Approvers set for this Department will also be fetched in his Leave Application.

As per this configuration, when an Expense Claim is being created by the User reporting to Kenneth, it will also be accessible to Kenneth as well.

Can you please ensure that seniors Employee ID is updated as Reports To in the Employee's who report to him/er? After that, manager should be able to view the Expense Claims and other documents (like Leave Application, Appraisal etc.) made for his/her sub-ordinates.

Module 2: Payroll

1. Payroll Setup

Salary is a fixed amount of money or compensation paid to an employee by an employer in return for the work performed.

Payroll is the administration of financial records of employees' salaries, wages, bonuses, net pay, and deductions.

To process Payroll in EduLead,

1. Define Payroll Period (optional)
2. Define Income Tax Slab (optional)
3. Create Salary Structure with Salary Components (Earnings and Deductions)
4. Assign Salary Structures to each Employee via Salary Structure Assignment
5. Generate Salary Slips via Payroll Entry.
6. Book the Salary in your Accounts.

1.1 Payroll Period

Payroll Period, in EduLead, is a period for which Employees get paid for their occupation with the Company. Payroll period helps you define Tax slabs applicable for the period, making it easier to manage changing laws.

Note: Configuring Payroll Period is optional if you do not intend to use Flexible Benefits or Tax Slabs

1.2 Salary Component

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This document allows you to define each Earning and Deduction component which can be used to create a Salary Structure and subsequently create Salary Slip or Additional Salary. You can also configure the type, condition and formula as well as other settings which are discussed below. You should be able to enable various combinations of the following options to configure each component as it fits your Company / Regional policies.

- Depends on Leave Without Pay: Leave Without Pay (LWP) happens when an Employee runs out of allocated leaves or takes a leave without an approval (via Leave Application). If enabled, EduLead will automatically deduct the pay in proportion of LWP days divided by the total working days for the month (based on the Holiday List). Note: If you don't want EduLead to manage LWP, don't turn on this flag in any of the Salary Components
- Do not include in total: If this option is enabled, the component won't be added to the total of the Earnings or Deductions of the Salary Slip

1.2.1 Earning

- Is Additional Component: This option specify that the component can only be paid as Additional Salary. Examples of this component could be Performance Bonus or pay received for on-site deputation etc. Such components are not considered to be part of normal Salary Structure. Instead, Additional Salary with these components can be submitted as required which will be added to the Salary Slip automatically.
- Is Tax Applicable: If a component needs to be considered for Tax calculations specified as per the Payroll Period you may want to enable this option. It would be required that you have a Payroll Period and Income Tax Slab configured with valid Tax Slabs for payroll processing.
- Is Payable: Such components can be booked against separate payable accounts and the Accounts shall be configured in the Accounts table
- Flexible Benefits: Flexible Benefits are earning components which Employees can choose to receive on a pro-rata basis or annually when they claim for. These are mostly tax exempted, unless the Employee fail to file the claim with adequate bills / documents. If turned on, you can specify the maximum benefit allowed for an employee in a year. Employees can create Employee Benefit Application with the ones they opt for. Note: Employee Benefit Application will only allow Employees to only choose from the flexible components which are present in the Salary Structure assigned to the Employee
- Pay Against Benefit Claim: Employees can opt to receive flexible benefits annually via Employee Benefit Claim or along with their salary every month. If you enable this, the

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amount allocated for the component will be paid as the Employee submits an Employee Benefit Claim. Else the amount will be dispersed as part of the Employee's salary on a pro-rata basis.

- Only Tax Impact (Cannot Claim But Part of Taxable Income): Such components are those which the company has already paid to the Employee in cash or by some other means, for example a car purchased for the Employee's use. The Employee cannot claim but is liable to pay tax. The amount allocated for this component will be considered while calculating the taxable income of the Employee.
- Create Separate Payment Entry Against Benefit Claim: Some of the flexible benefits may be legally required to be paid via separate vouchers. If you enable this, while posting the bank entry the amount paid for such components will be posted as a separate entry for each Employee.

Note: Normal Tax calculation does not include Flexible Benefits as in most cases these are exempted from Tax. To tax these components any time before that last payroll, use "Deduct Tax For Unclaimed Employee Benefits" in Payroll Entry / Salary Slip while processing the Salary.

1.2.2 Deduction

- Variable Based On Taxable Salary: If you enable this, the component will be considered as the standard Tax deduction component. Tax will be calculated based on the Income Tax Slab linked to the employee.

2. Salary Structure

Salary Structure represents how Salaries are structured and calculated based on Earnings and Deductions. Salary structures are used to help organizations:

1. Maintain pay levels that are competitive with the external labor market,
2. Maintain internal pay relationships among jobs,
3. Recognize and reward differences in the level of responsibility, skill, and performance, and manage pay expenditures.

Usual components of a salary structure (in India) include:

- Basic Salary: It is the taxable base income and generally not more than 40% of CTC.
- House Rent Allowance: The HRA constitutes 40 to 50% of the basic salary.
- Special Allowances: Makes up for the remainder part of the salary, mostly smaller than the basic salary which is completely taxable.

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- Leave Travel Allowance: The non-taxable amount paid by the employer to the employee for vacation/trips with family within India.
- Gratuity: It is basically a lump sum amount paid by the employer when the employee resigns from the organization or retires.
- PF: Fund collected during emergency or old age. 12% of the basic salary is automatically deducted and goes to the employee provident fund.
- Medical Allowance: The employer pays the employee for the medical expenditures incurred. It is tax-free up to Rs.15,000.
- Bonus: Taxable part of the CTC, usually a once a year lump sum amount, given to the employee based on the individual's as well as the organizational performance for the year.
- Employee Stock Options: ESOPS are Free/discounted shares given by the company to the employees. This is done to primarily increase employee retention.

2.1 Creating a New Salary Structure

To create a new Salary Structure, go to:

Human Resources > Payroll Setup > Salary Structure > New Salary Structure

In the new Salary Structure,

1. Name the salary Structure and set the company, letterhead for Salary Slip printing and frequency of payroll etc.
2. Set the starting date from which this is valid (Note: There can only be one Salary Structure that can be "Active" for an Employee during any period).
3. Configure Leave Encashment Amount per Day which will be the amount payable to Employees on Leave Encashment requests.
4. Max Benefits amount is the maximum amount eligible as Flexible Components to employees.

2.1.1 Salary Slip Based on Timesheet

Salary Slip based on Timesheet is applicable if you have timesheet based payroll system

1. Check "Salary Slip Based on Timesheet"
2. Select the salary component and enter Hour Rate (Note: This salary component gets added to earnings in Salary Slip)

2.1.2 Earnings and Deductions in Salary Structure

In the "Earnings" and "Deductions" tables, you can select the earnings and deductions components The condition and formula configured in Salary Component will be copied by default,

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but you may change this if required. You may also want to select the Base component in the Earnings table. Note that the amount eligible for each employee should be configured in Salary Structure Assignment.

If the condition and formula for any of the earnings or deductions are not configured in Salary Component, you can calculate the values of Salary Components based on,

2.1.3 Condition and Amount

In conditions and formulas,

- Use field "base" for using base salary of the Employee
- Use Salary Component abbreviations. For example: BS for Basic Salary
- Use field name for employee details. For example: Employment Type for employment_type

2.1.4 Account Details

- Select Mode of Payment and Payment Account for the Salary Slips which will be generated using this Salary Structure

Finally, *Save* the Salary Structure.

3. Leave Without Pay (LWP)

Leave Without Pay (LWP) happens when an Employee runs out of allocated leaves or takes a leave without an approval (via Leave Application). If you want EduLead to automatically deduct salary in case of LWP, then you must check on the “Apply LWP” column in the Earning Type and Deduction Type masters. The amount of pay cut is the proportion of LWP days divided by the total working days for the month (based on the Holiday List).

If you don’t want EduLead to manage LWP, leave the LWP unchecked in all of the Earning Types and Deduction Types.

4. Salary Structure Assignment

Salary Structure Assignment allows you to assign salary structure and specify the base pay eligible for each employee. It is important that you set the base salary for each assignment as this will be the base salary used for calculations as per the Salary Structure.

To create a new Salary Structure Assignment go to:

Human Resources > Payroll > Salary Structure Assignment > New Salary Structure Assignment

5. Processing Payroll

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You can either bulk process payroll for Employees under a department, branch or designation or process payroll individually by creating Salary Slips for each employee.

5.1 Payroll Processing Using Payroll Entry

You can also create salary slip for multiple employees using Payroll Entry:

Human Resources > Payroll > Payroll Entry > New Payroll Entry

5.1.1 Payroll Entry

In Payroll Entry,

1. Select the Company for which you want to create the Salary Slips. You can also select the other fields like Branch, Department, Designation or Project to be more specific.
2. Check *Salary Slip based on Timesheet* if you want to process timesheet based Salary Slips.
3. Select the Posting Date and the frequency of payroll which you want to create the Salary Slips.
4. Click on "Get Employee Details" to get a list of Employees for which the Salary Slips will be created based on the selected criteria.
5. Enter the Start and End dates for the payroll period.
6. You can check *Deduct Tax For Unclaimed Employee Benefits* if you want to deduct taxes for all benefits (Salary Components which are *Is Flexible Benefit*) paid to employees till the current payroll
7. Similarly, *Deduct Tax For Unsubmitted Tax Exemption Proof* allows you to deduct taxes for the earnings which were exempted in the previous payrolls as declared in Employee Tax Exemption Declaration but the Employee has not submitted sufficient proof Employee Tax Exemption Proof Submission
8. Select the Cost Center and Payment Account.
9. Save the form and Submit it to create Salary Slip records for each active Employee for the time period selected. If the Salary Slips are already created, the system will not create any more Salary Slips. You can also just save the form as Draft and create the Salary Slips later.

Once all Salary Slips are created, you can use *View Salary Slips* to verify if they are created correctly or edit it if you want to deduct Leave Without Pay (LWP).

After Check-in, you can "Submit" them all together by clicking on "Submit Salary Slip".

Note: Submitting Salary Slips will also book the default Payroll Payable account to record the accrual of salary.

5.1.2 Booking Salaries in Accounts

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The final step is to book the Salaries in your Accounts.

Salaries in businesses are usually dealt with extreme privacy. In most cases, the companies issues a single payment to the bank combining all salaries and the bank distributes the salaries to each employee's salary account. This way there is only one payment entry in the company's books of accounts and anyone with access to the company's accounts will not have access to the individual salaries.

The salary payment entry is a Journal Entry that debits the total of the earning type salary component and credits the total of deduction type salary component of all Employees to the default account set at Salary Component level for each component.

To generate your salary payment voucher from Payroll Entry, click on -

Make > Bank Entry

Payroll Entry will route you to Journal Entry with relevant filters to view the draft Journal Vouchers created. You shall set reference number and date for the transactions and Submit the Journal Entries.

Note: For Salary Components which are Flexible Benefits and has *Create Separate Payment Entry Against Benefit Claim* checked, EduLead will book separate draft Journal Entries.

6. Creating Salary Slips Manually

Once the Salary Structure is created and assigned to employees via Salary Structure Assignment, you can make a Salary Slip individually. Go to:

Human Resources > Payroll > Salary Slip > New Salary Slip

7. Payroll Management

Payroll processing is an important function of every enterprise HR. EduLead greatly simplifies this process by offering an array of features that you can utilize from Salary Structure management to bulk processing Payroll of employees. Read the following documentation to understand how to configure and use EduLead Human Resources to super power your Payroll processing.

7.1 Related Topics

1. Payroll Period
2. Salary Component
3. Salary Structure

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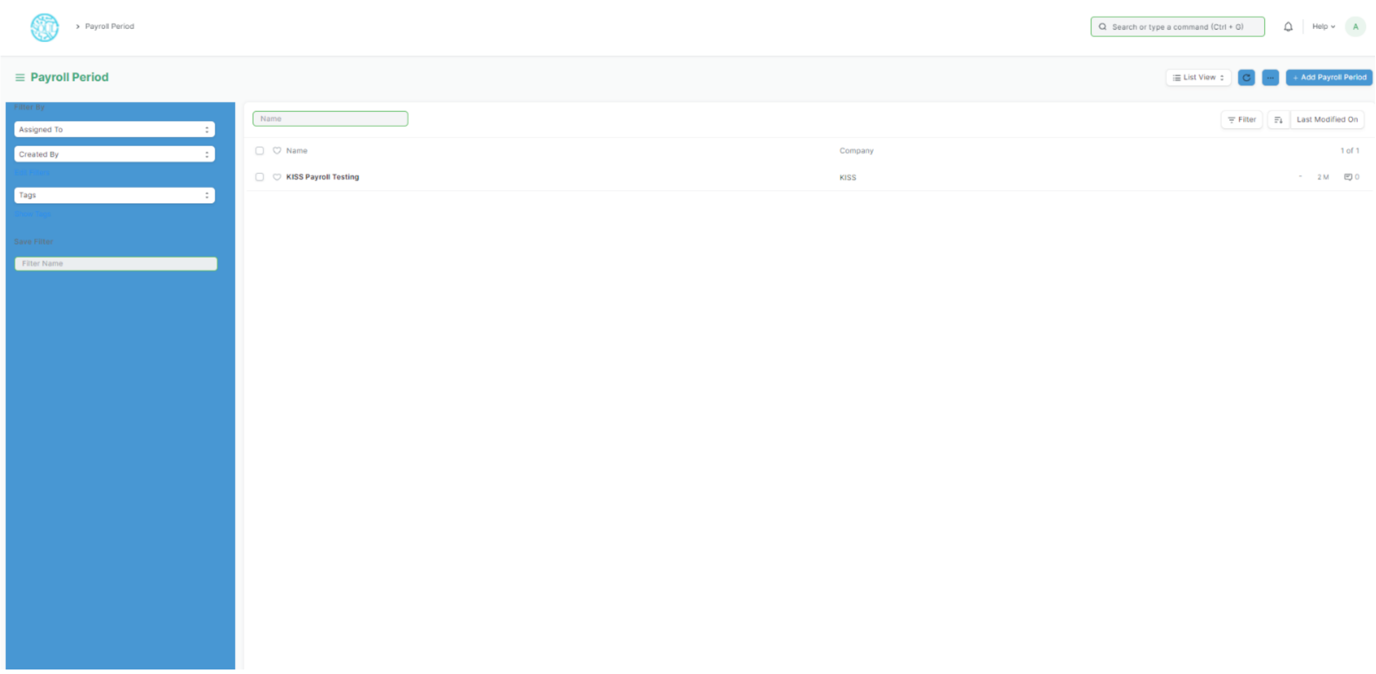
4. Salary Structure Assignment
5. Payroll Entry
6. Additional Salary
7. Retention Bonus
8. Employee Incentive

8. Payroll Period

A Payroll Period is a period for which Employees get paid for their occupation with the Company. Payroll Period helps you define Salary Structures and to calculate tax for a specific period based on applicable Income Tax Slab.

To access Payroll Period, go to:

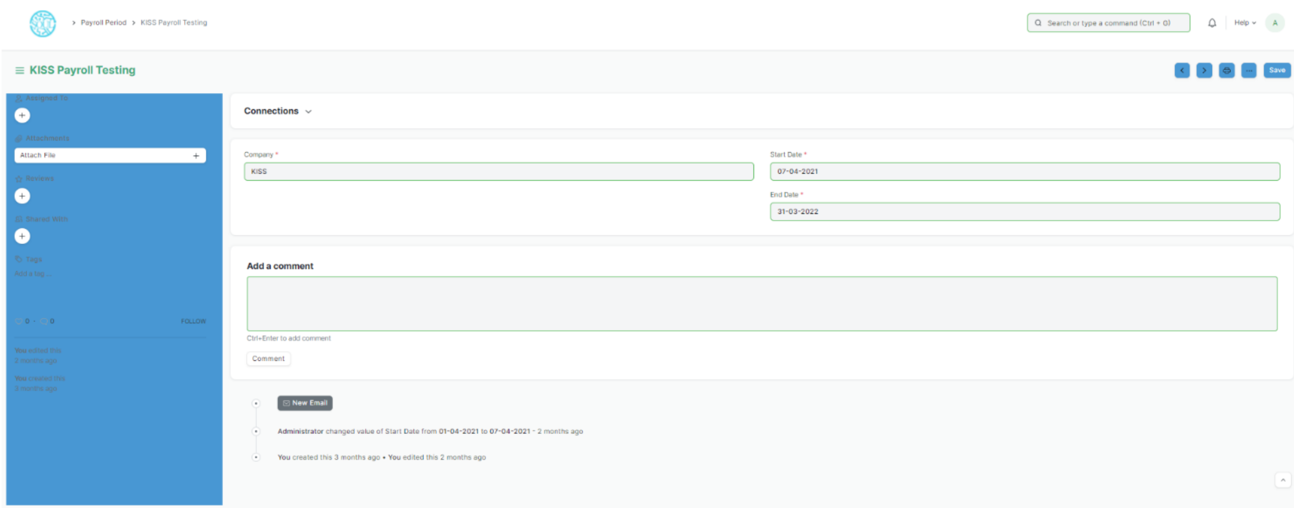
Home > Human Resources > Payroll > Payroll Period



8.1 How to create a Payroll Period

1. Go to Payroll Period list, click on New.
2. Enter Name.
3. Select Start Date and End Date of Payroll Period.

4. Save.



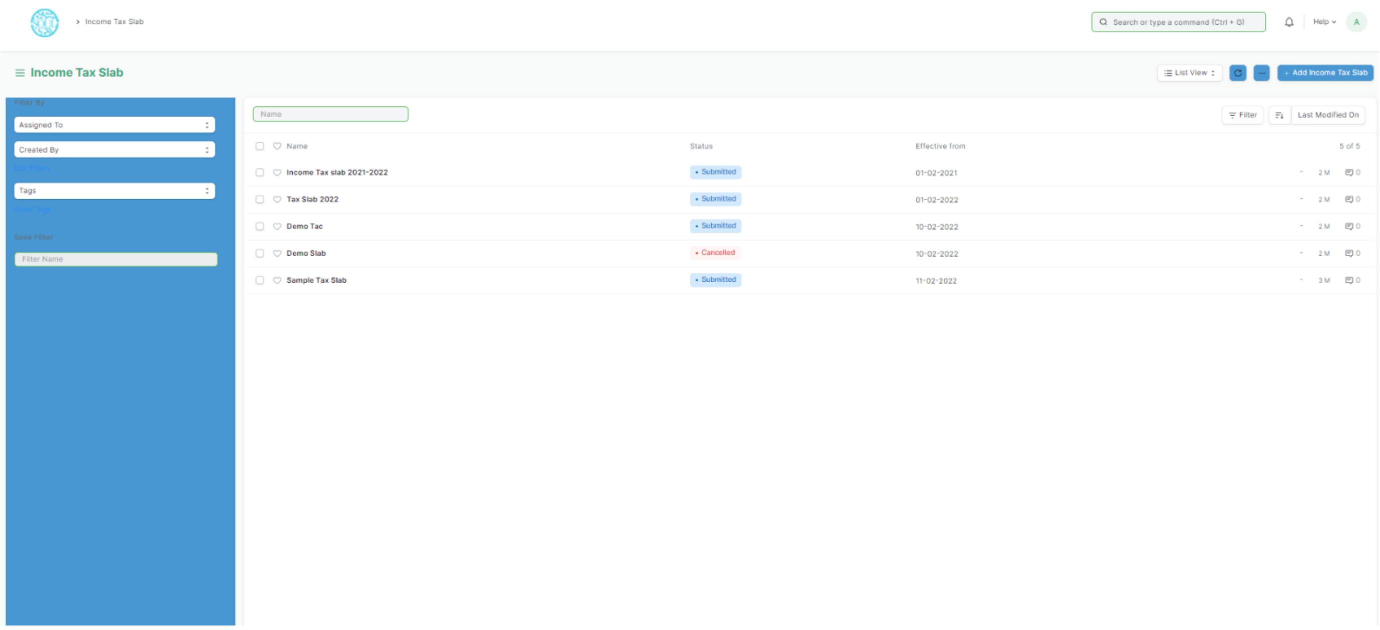
8.2 Related Topics

1. Salary Component
2. Salary Structure
3. Income Tax Slab
4. Payroll Entry
5. Employee Tax Exemption Proof Submission
6. Employee Tax Exemption Declaration

9. Income Tax Slab

Income Tax Slab is a document to define income tax rates based on different taxable income slab. In many countries, income tax is levied on individual taxpayers based on a slab system where different tax rates have been prescribed for different slabs and such tax rates keep increasing with an increase in the income slab. In EduLead, you can define multiple Income Tax Slabs and link them to individual employee's salary structure via Salary Structure Assignment.

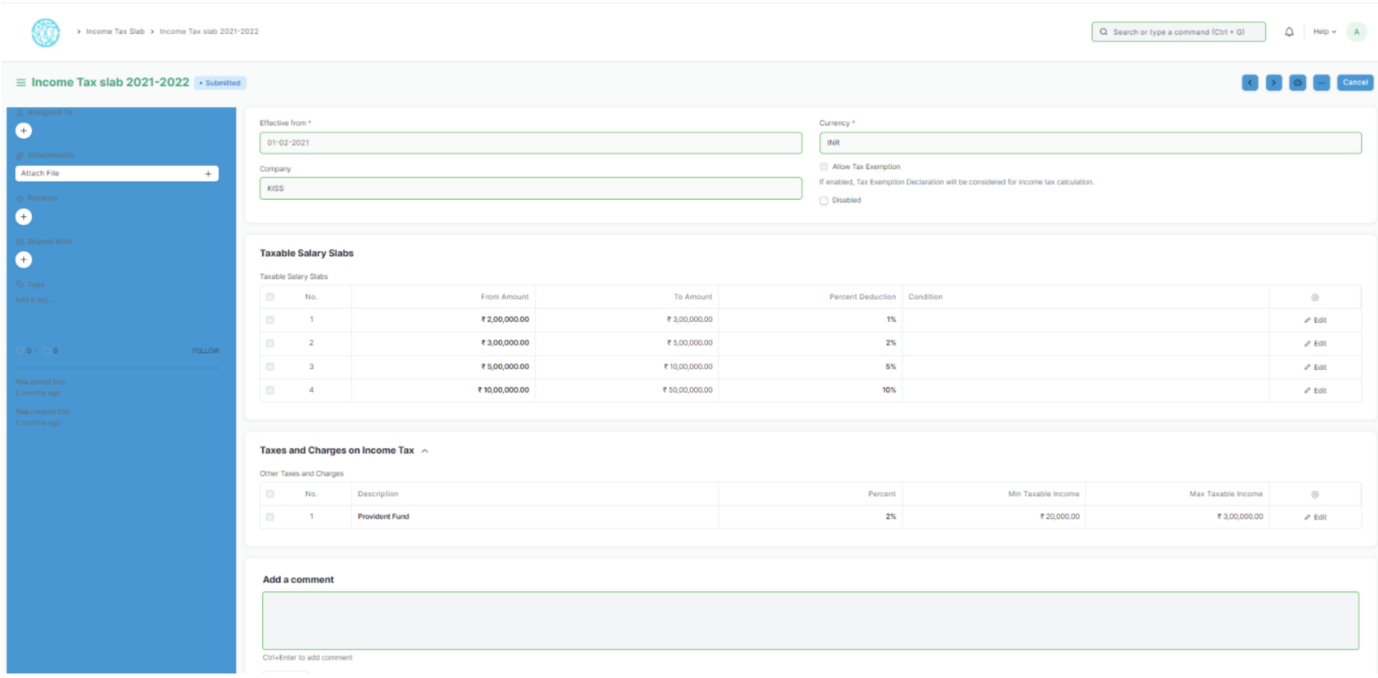
To access Income Tax Slab, go to:



9.1 How to create an Income Tax Slab

To create a new Income Tax Slab:

1. Enter a Name for the IT Slab, Company and the date from which it will be Effective From.
2. Enable the checkbox 'Allow Tax Exemption' if applicable.
3. Save and Submit.



9.2 Features

9.2.1 Tax Slabs

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In the Tax Slab table, you can define the rate for different income slabs. To define slab, From Amount and To Amount should be entered. For the first slab, From Amount is optional and for the last slab, To Amount is optional. Both the amount is inclusive while evaluating tax based on taxable income.

The tax slab can be applicable based on specific conditions. Conditions can be written using all field names of Employee, Salary Structure, Salary Structure Assignment, and Salary Slip documents.

Examples:

```
// Apply tax if employee born between 31-12-1937 and 01-01-1958 (Employees aged 60 to 80)
date_of_birth > date(1937, 12, 31) and date_of_birth < date(1958, 01, 01)
// Apply tax by employee gender
gender == "Male"
// Apply tax by Salary Component
base > 10000
// Annual Taxable income is greater than 5 lakhs
annual_taxable_earning > 500000
```

9.2.2 Other Taxes and Charges on Income Tax

If other taxes are applicable on calculated income tax, you can enter those using this table. You can also define the min and max taxable amount for which this tax will be applicable. For example, Health and Education Cess is applied additionally on income tax to everyone in India.

9.2.3 Other Properties

- Allow Tax Exemptions: Tax exemptions can be allowed for a specific Income Tax Slab. If enabled, while calculating taxes based on this tax slab, Employee Tax Exemption Declaration and Proof Submission are considered for calculating taxable income.
- Standard Tax Exemption Amount: If exemption is allowed, the Standard Tax Exemption Amount defined by the government can be added here. This exemption generally does not need any kind of document proof and applicable to all employees linked to this income tax slab.

9.3 Related Topics

1. Salary Component
2. Salary Structure

3. Salary Structure Assignment
4. Payroll Entry
5. Employee Tax Exemption Declaration
6. Employee Tax Exemption Proof Submission

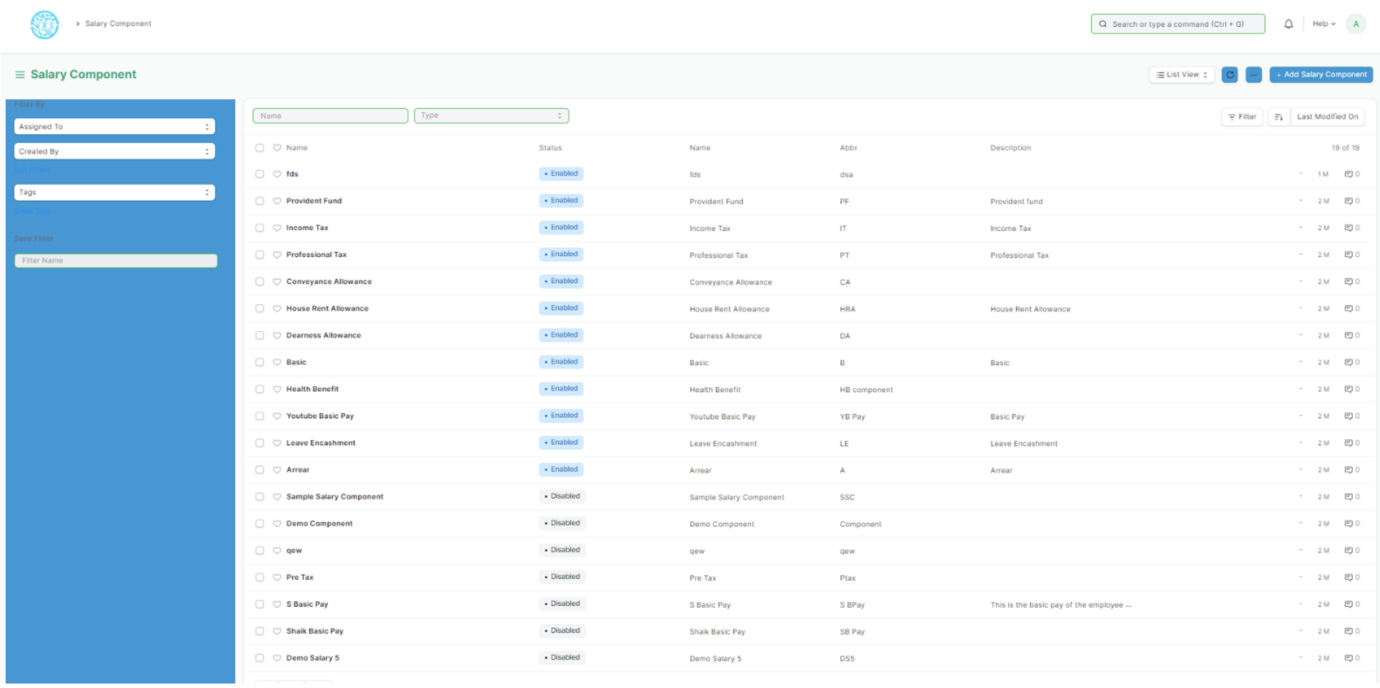
10. Salary Component

Salaries are paid by organizations to their employees in exchange for the services rendered by them. The different components that make up the Salary Structure are called as Salary Components.

Salary paid to the employees comprises of several different components, such as basic salary, allowances, arrears, etc. EduLead allows you to define these Salary Components and also specify its various attributes.

To access Salary Component, go to:

Home > Human Resources > Payroll > Salary Component



10.1 How to create a Salary Component

To create a new Salary Component:

1. Go to Salary Component list, click on New.
2. Enter its Name and Abbreviation.
3. Enter Description of the Salary Component (optional).
4. Enter the Company name and the Default Account of the Salary Component in the Accounts table.

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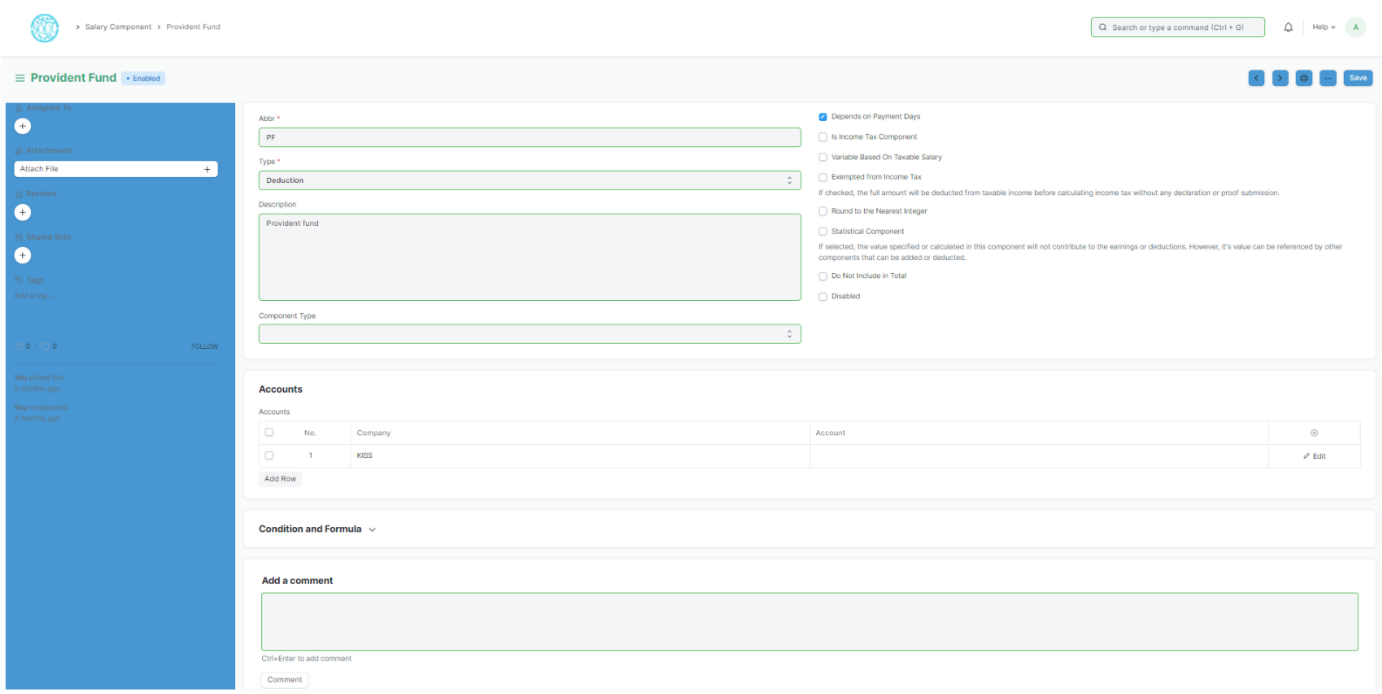
5. Save.



10.2 Features

Apart from the above mentioned mandatory fields, some of the additional features of the Salary Component are given below:

10.2.1 Condition and Formula

In this section, the Condition and Formula required for the calculation of the Salary Component can be specified. To specify the formula, enable the 'Amount based on formula' checkbox.
In case the Salary Component is based on a pre-defined amount, EduLead allows you to directly enter the amount in the Amount field (disable the 'Amount based on formula' checkbox).
Note: This above setup is optional. You can define Amount and Formula/Condition for a Salary Component directly in the Salary Structure also. If they are specified in the Salary Component document itself, the information will be directly fetched in the Salary Structure when the Component is selected.

10.2.2 Additional Properties

Some of the additional attributes of the Salary Component that can be enabled using checkboxes are as follows:

- Is Payable: Select this if the Salary Component is payable.

- Depends on Payment Days: If this checkbox is enabled then the Salary Component will be calculated based on the number of working days.
- Is Tax Applicable: This checkbox is applicable for Earning Components. Selecting this checkbox allows tax to be applied on this Salary Component.
- Deduct Full Tax on Selected Payroll Date: If checked and the component is used in Additional Salary, the tax amount applicable on the additional amount will be deducted on the specific payroll month. If not checked, the tax will be distributed over the remaining months of the payroll period. For example, if a bonus is given in a particular month using Additional Salary, then you can deduct full tax amount in the same month only.
- Round to the Nearest Integer: Selecting this checkbox allows you to round the amount of this Salary Component to the nearest integer.
- Statistical Component: If selected, the value specified or calculated in this component will not contribute to the earnings or deductions. However, it's value can be referenced by other components that can be added or deducted. If you set a Salary Component as a Statistical component, then you do not have to set the Default Account for the same. Also, you would not be able to set this component as a Flexible Benefit.
- Do Not Include in Total: Selecting this checkbox ensures that the Salary Component is not included in the Total Salary. It is used to define the component which is part of the CTC but not payable (e.g. Usage of Company Cars).
- Variable Based On Taxable Salary: The component is calculated automatically on taxable income based on applicable Income Tax Slab (e.g. TDS or Income Tax).
- Exempted from Income Tax: If checked, the full amount will be deducted from taxable income before calculating income tax without any declaration or proof submission. For example, Professional Tax in India is deducted from taxable income before calculating income tax.
- Disabled: This checkbox can be selected to disable this Salary Component. A disabled Salary Component cannot be used in the Salary Structure.

10.2.3 Flexible Benefits

This section is shown if the Salary Component is an Earning Component. Flexible Benefit plans allow employees to avail the benefits they want or need from a package of programs offered by an employer. They may include health insurance, pension plans, telephone expenses, etc. To set a Salary Component as a Flexible Benefit, check the 'Is Flexible Benefit' checkbox.

Enter the maximum yearly amount for this flexible benefit in the 'Max Benefit Amount (Yearly)' field. Some of the additional attributes of the Flexible Benefits that can be enabled using checkboxes are as follows:

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- Pay Against Benefit Claim: Enable this checkbox if you want to pay this benefit via the Employee Benefit Claim.
- Only Tax Impact (Cannot Claim But Part of Taxable Income): If set, the flexible benefit will be part of taxable income.
- Create Separate Payment Entry Against Benefit Claim: If this checkbox is checked, it will let you create a separate payment entry against the Benefit Claim.

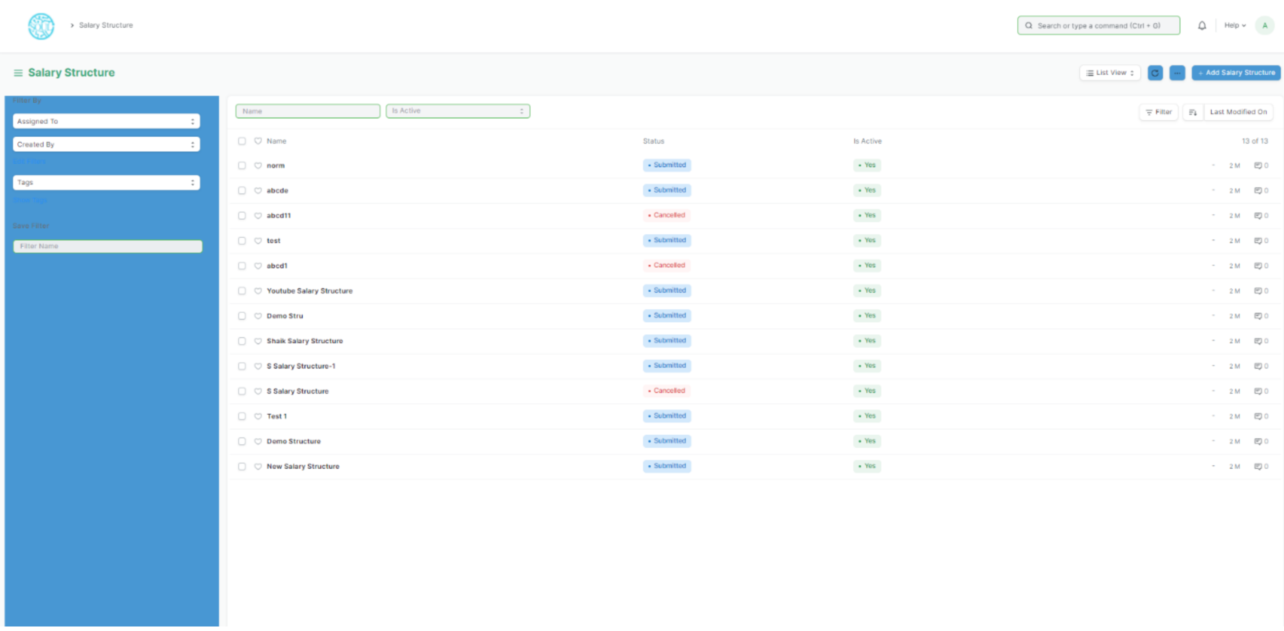
10.3 Related Topics

1. Salary Structure
2. Salary Structure Assignment
3. Payroll Entry
4. Payroll Period

11. Salary Structure

Salary Structure is the details of the salary being offered to an Employee, in terms of the breakup of the different components constituting the compensation.
Any changes to the Salary Structure i.e. among the components can have a major impact on what the Employee does, such as the kind of tax exemptions claimed.
EduLead allows you to define the Earnings and Deductions of a Salary Structure, Payroll frequency, and Payment Mode among other features.
To access Salary Structure, go to:

Home > Human Resources > Payroll > Salary Structure



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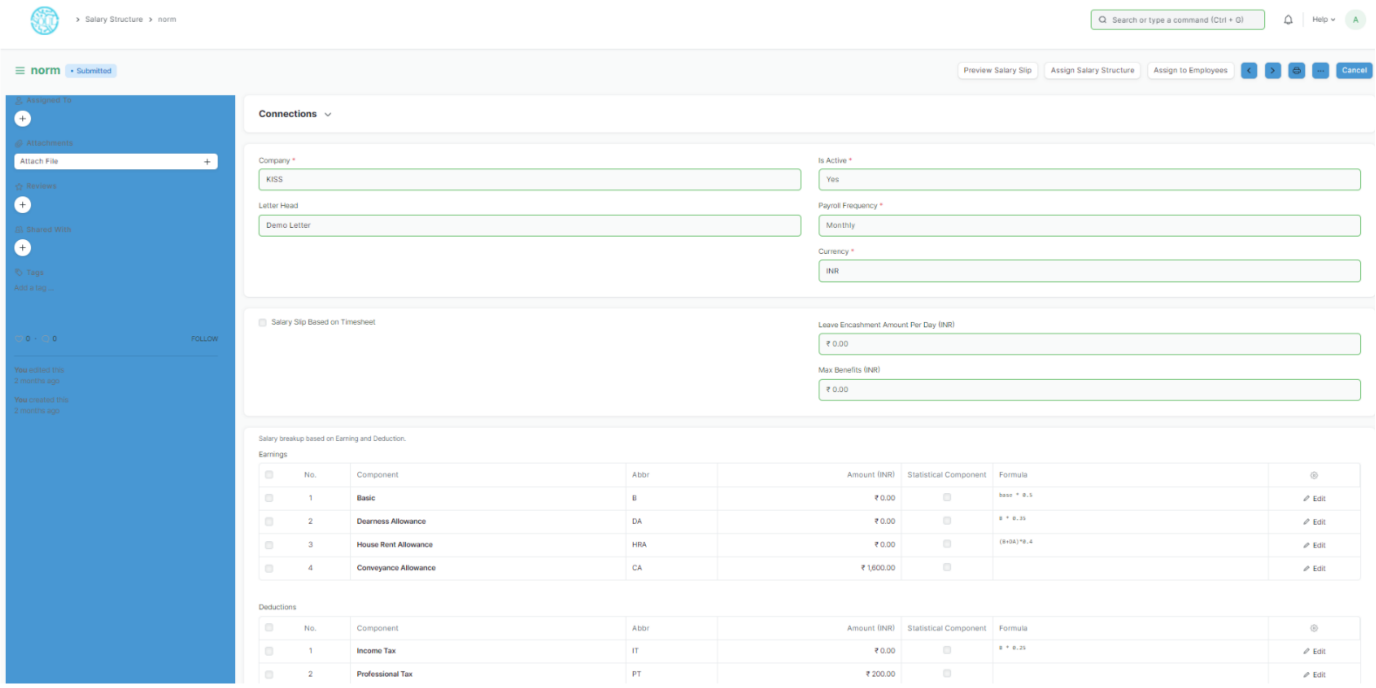
11.1 Prerequisites

Before you create a Salary Structure, it is advisable you have the following:

- Salary Component

11.2 How to create a Salary Structure

1. Go to the Salary Structure list, click on New.
2. Enter the Salary Structure Name.
3. Select the Company Name and Payroll Frequency.
4. Save and Submit.



11.3 Features

11.3.1 Earnings and Deductions

Earnings specify the Salary Components that are earned by an Employee. These components typically include basic, allowances, bonuses, and incentives that are added to the employee's Total Salary. On the other hand, Deductions specify the Salary Components that are deducted from the employee's Total Salary. These typically include the taxes.

Note: Only Salary Components set as 'Earnings' will be shown in the Earnings table and components set as 'Deductions' will be shown in the Deductions table.

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To create Earnings and Deductions, select the Salary Component in the Component column. Enter the Formula/Condition if not previously specified while creating the Salary Component. Additionally, you can also enter a pre-defined amount in the Amount column.

Note: Make sure to click on the downward arrow and enable the 'Amount based on formula' checkbox in case the Salary Component is calculated using a formula.

11.3.2 Account

In this section, the Mode of Payment and the Payment Account that is used to pay the salary can be specified.

11.3.3 Salary Structure for Salary based on Timesheets

In EduLead you can also define the Salary Structure for Salary Slip based on Timesheet, which allows the Company to pay there Employee as per working hours.

Steps for creating Salary Structure based on Timesheets:

1. Go to Salary Structure List, click on New.
2. Select checkbox Salary Slip Based on Timesheet.
3. Select the Salary Component.
4. Enter the Hour Rate. Based on the Rate entered, the amount for Working hours for the selected Salary Component will be calculated accordingly.
5. Save and Submit.

11.3.4 Leave Encashment Amount Per Day

In case there are encashable leaves for an Employee, you can define the leave encashment amount per day in this field for this particular Salary Structure. Based on the 'Earning Component' set in the encashed Leave Type and the amount per day, the value for the Salary component will be calculated accordingly in the Salary Slip.

11.3.5 Max Benefits (Amount)

In this field, the Max Benefits Amount for the Salary Structure can be specified. If this field is filled, make sure the Salary Structure has a Salary Component with the "Is Flexible Benefits" checked, against which this amount will be paid.

Once all the information is saved and submitted, you can assign the Salary Structure to an Employee either through the Assign Salary Structure button or by creating a new Salary Structure Assignment through the dashboard.

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You can also assign the created Salary Structure to several employees based on the Employee Grade, Department, Designation, etc. through the 'Assign to Employees' button. Additionally, Salary Slip can also be directly created through the dashboard.

11.4 Related Topics

1. Salary Component
2. Salary Structure Assignment
3. Payroll Entry

12. Salary Structure Assignment

Salary Structure Assignment form allows you to assign a particular Salary Structure to the employee.

In EduLead, you can create multiple Salary Structure Assignments for the same Employee for different periods.

To access Salary Structure Assignment, go to:

Home > Human Resources > Payroll > Salary Structure Assignment

12.1 Prerequisites

Before you create a Salary Structure Assignment, it is advisable you have the following documents:

1. Employee
2. Salary Component
3. Salary Structure

12.2 How to create a Salary Structure Assignment:

1. Go to Salary Structure Assignment list and click on New.
2. Select the Employee and Salary Structure.
3. Select the From Date from which this particular Salary Structure will be applicable.
4. Select preferred Income Tax Slab for the employee.
5. Enter Base and Variable amount as per requirement.
6. Base amount refers to the Base Salary of the Employee, which is fixed and paid out, regardless of employees meeting their goals.
7. Variable pay, on the other hand, is the portion of sales compensation determined by employee performance.

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8. When employees hit their goals (aka quota), variable pay is provided as a type of bonus, incentive pay, or commission.

12.2.1 Alternate ways to create Salary Structure Assignment

You can also assign a Salary Structure to Employee(s) directly through the Salary Structure document. To assign the Salary Structure to a single employee, click on the 'Assign Salary Structure' button in the Salary Structure document.

If you want to bulk assign the Salary Structure to multiple employees, you can do so via the 'Assign to Employees' button.

You can optionally filter out employees based on Employee Grade, Department, Designation, and Employee itself.

Once this is done, click on the 'Assign' button to assign the Salary Structure accordingly.

12.3 Related Topics

1. Salary Component
2. Salary Structure
3. Employee Grade
4. Department
5. Designation
6. Payroll Entry

13. Salary Slip

A salary slip is a document issued to an employee. It contains a detailed description of the employee’s salary components and amounts.

To access Salary Slip, go to:

Home > Human Resources > Payroll > Salary Slip

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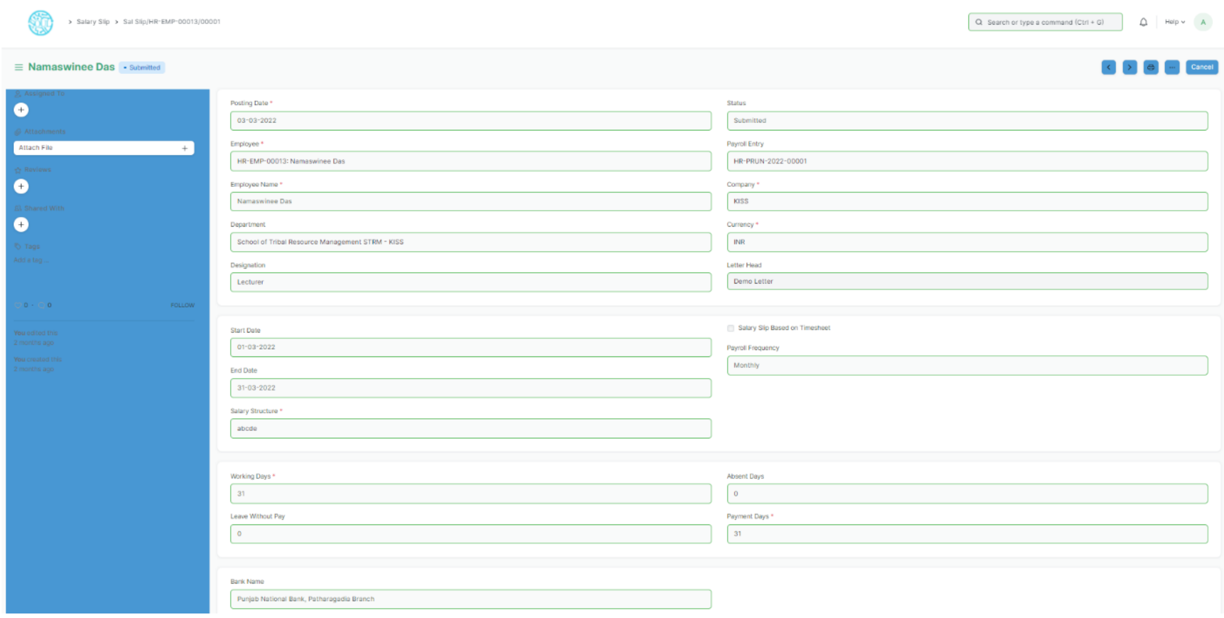
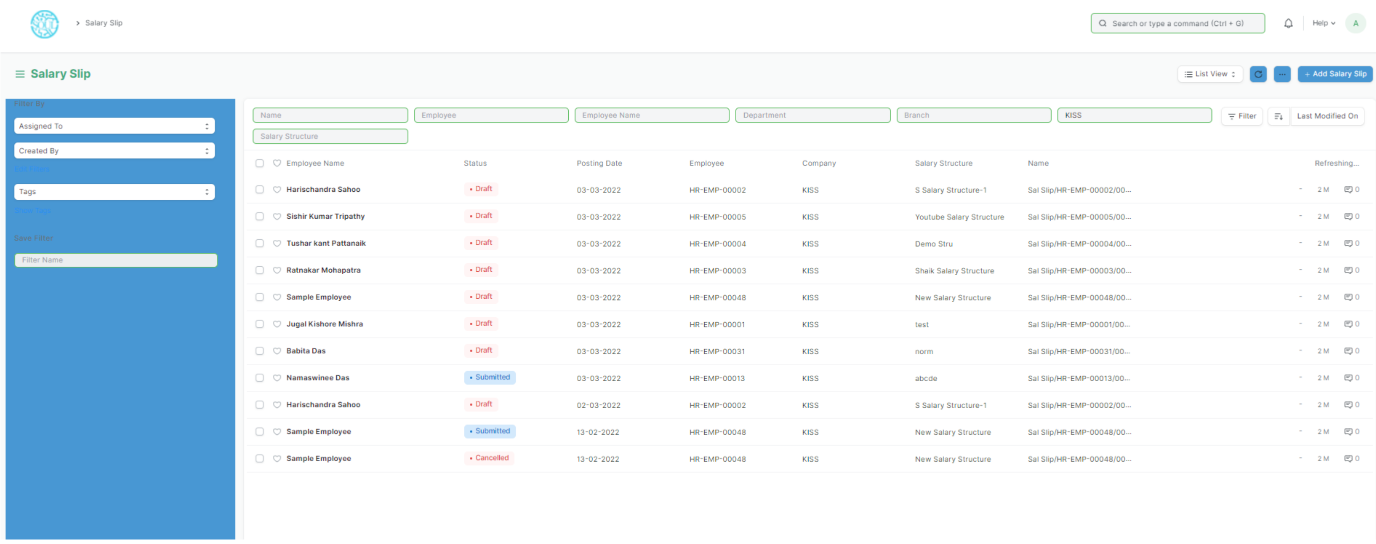


13.1 Prerequisites

Before creating Salary Slip, it is advised that you create the following first:



- Employee
- Salary Structure
- Salary Structure Assignment

13.2 How to create a Salary Slip

1. Go to Salary Slip, Click on New.
2. Select Employee. On selecting Employee all details of the Employee will be fetched from Salary Structure which is assigned to that Employee. This includes details such as Payroll Frequency, Earnings, Deductions, etc.
3. Select Start Date and End Date.
4. Save.

13.3 Feature

13.3.1 Salary Slip based on Attendance/Leave

HR users can create Salary Slip based on Attendance or leave. The Working days will calculate on basis of leave/Attendance, depending on the field Calculate Payroll Working Days Based On in HR Settings. If Payroll is based on Attendance then, the Leave without pay will be considered as absent and half-day will be considered as half-day absent.

13.3.2 Salary Slip based on Timesheet

For creating Salary Slip based on timesheet you need to create Salary Structure for Timesheets.
EduLead also provides an option to create Salary slip based on working hours based on Timesheet.
You can create Salary Slip after submitting the Timesheet by clicking directly on Create Salary Slip button on the top right.
The Payment Amount is calculated based on Hour Rate defined in Salary Structure and is reflected in the Earnings table.

13.3.3 Year to Date and Month to Date

For every salary slip, 'Year to Date' and 'Month to Date' are computed.

- Year to Date: Total salary booked for that particular employee from the beginning of the year (payroll period or fiscal year) up to the current salary slip's end date.
- Month to Date: Total salary booked for a particular employee from the beginning of the month (for which the payroll entry is created) up to the current salary slip's end date.

Year to Date is also computed for every component in the earnings and deduction tables. The "Salary Slip with Year to Date" print format is available with Year to Date and Month to Date computations.

14. Payroll Entry

Payroll is the sum total of all compensation a business must pay to its employees for a set period of time or on a given date.
In EduLead, Payroll Entry enables bulk processing of payroll for employees. In other words, processing salary slips of all employees in one go. The bulk processing can be Company-wide or based on these categories: Branch, Department, or Designation.
To access Payroll Entry, go to:

Home > Human Resources > Payroll > Payroll Entry

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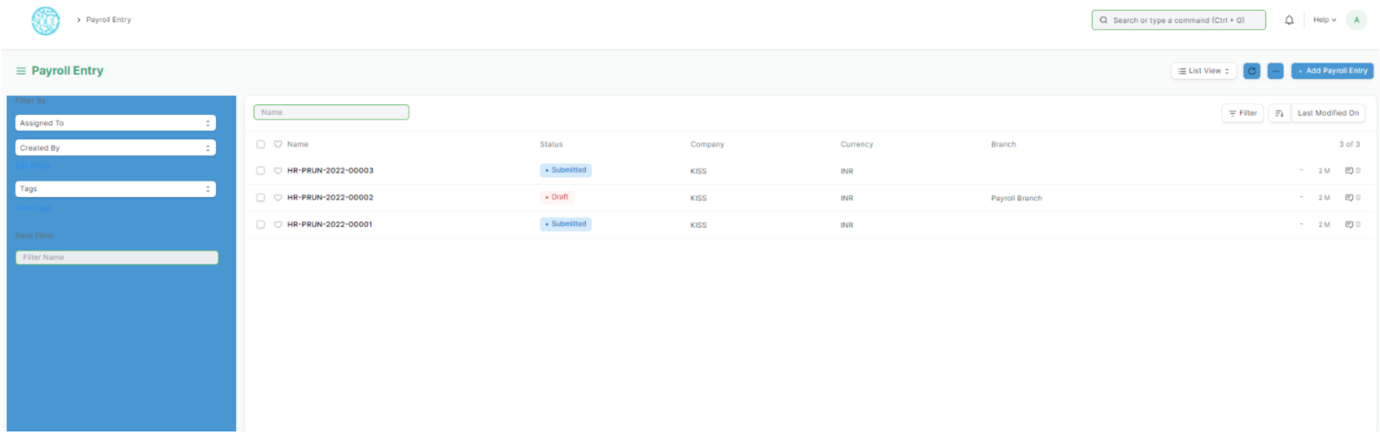
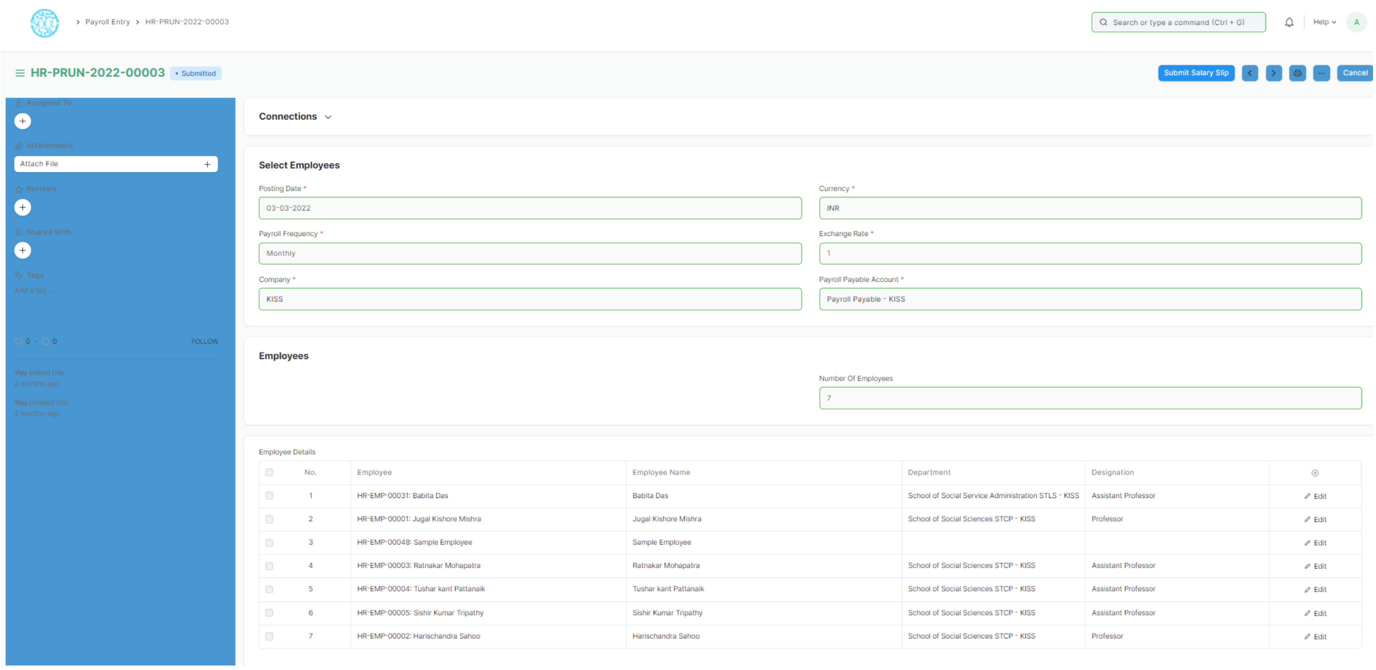


14.1 How to create a Payroll Entry

1. Go to to Payroll Entry list, click on New.
2. Select the Payroll Frequency.
3. Select Branch, Designation and Department to filter out employees (optional).
4. Select Project (optional) if you want to run the payroll against a project.
5. Select 'Validate Attendance' and 'Salary Slip Based on Timesheet' checkboxes in case you want to deduct the salary based on attendance and if you want to also consider the timesheets of the employees respectively.
6. Select the Payment Account to make the Bank Entry.
7. Save.

Once the information is saved, click on the Get Employees button to get a list of Employees for which the Salary Slips will be created based on the selected criteria.



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Once the list of Employees is fetched, click on the Create Salary Slips button to generate Salary Slips.
Note: If the Salary Slips are already created, the system will not create any more Salary Slips. You can also just save the form as Draft and create the Salary Slips later.

14.2 Features

14.2.1 Salary Accrual

After verifying the Salary Slips, you can Submit them all together by clicking on the Submit Salary Slip button.
This will also book the default Payroll Payable account against respective Expense Heads (as configured in Salary Components) to record the accrual of salary to employees.
Cost Center:
You can select Cost Center in the Payroll Entry against which the expenses will be posted.
If you want to book expenses against multiple cost centers based on Employee/Department, you can do so by setting Payroll Cost Center in the Employee/Department master.
Even multiple cost centers can be assigned against a single Employee, you can do so via Salary Structure Assignment document.
Cost Center assigned in Salary Structure Assignment gets highest priority and then Employee and Department master respectively. The least priority is given to the Cost Center selected in Payroll Entry.
Note: Submitting Salary Slips one by one manually will not create the Journal Entry to record salary accrual.

14.2.2 Salary Payment

The final step is to book the Salary Payment.
Salaries in businesses are usually dealt with extreme privacy. In most cases, companies issue a single payment to the bank combining all salaries and the bank distributes the salaries to each employee's salary account.
This way there is only one payment entry in the company's books of accounts and anyone with access to the company's accounts will not have access to the individual salaries.
The salary payment entry is a Journal Entry that debits the total of the Earnings type salary component and credits the total of Deductions type salary component of all Employees to the default account set at Salary Component level for each component.
To generate your salary payment voucher from Payroll Entry, click on the Make Bank Entry button.

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Payroll Entry will route you to Journal Entry with relevant filters to view the draft Journal Vouchers created. You will have to set the reference number and date for the transactions and Submit the Journal Entry.

Note: For Salary Components which are Flexible Benefits and has *Create Separate Payment Entry Against Benefit Claim* checked, EduLead will book separate draft Journal Entries.

14.3 Related Topics

1. Salary Component
2. Salary Structure
3. Payroll Period
4. Journal Entry

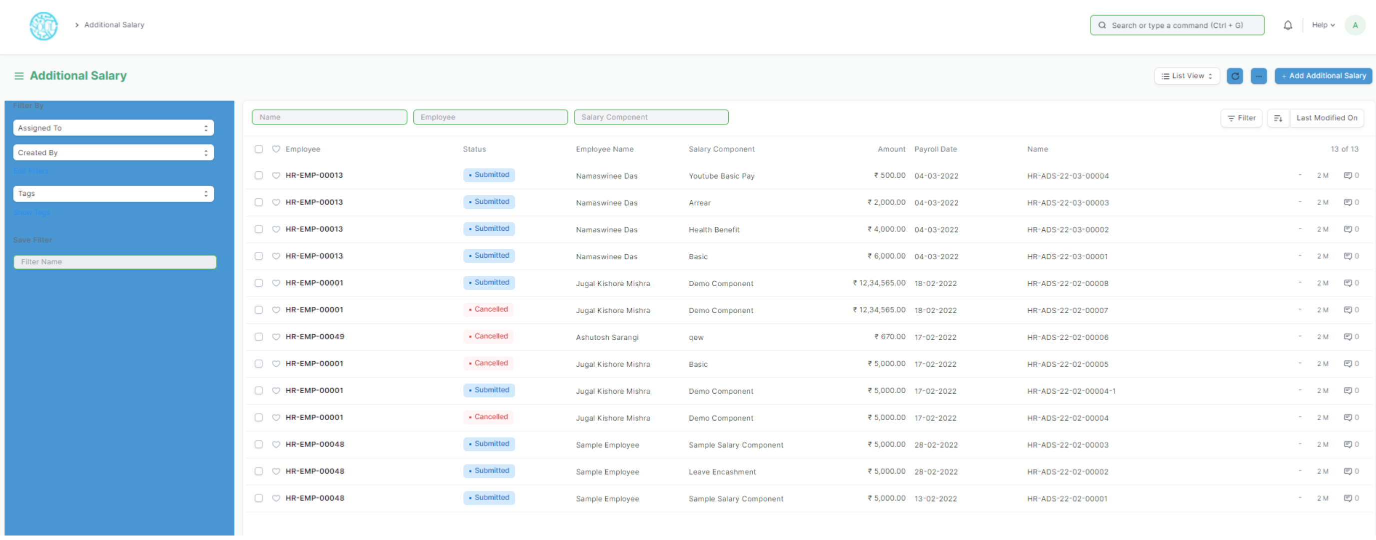
15. Additional Salary

Additional Salary is something that an Employee receives from the company they work for, other than their usual pay.

EduLead offers you a feature called Additional Salary to add or deduct ad hoc salary for a particular Employee while processing the Payroll. Some examples of Additional Salary could be Performance Bonus, Deputation Allowance, Arrears, Incentives, or other adjustments.

To access Additional Salary, go to:

Home > Human Resources > Payroll > Additional Salary



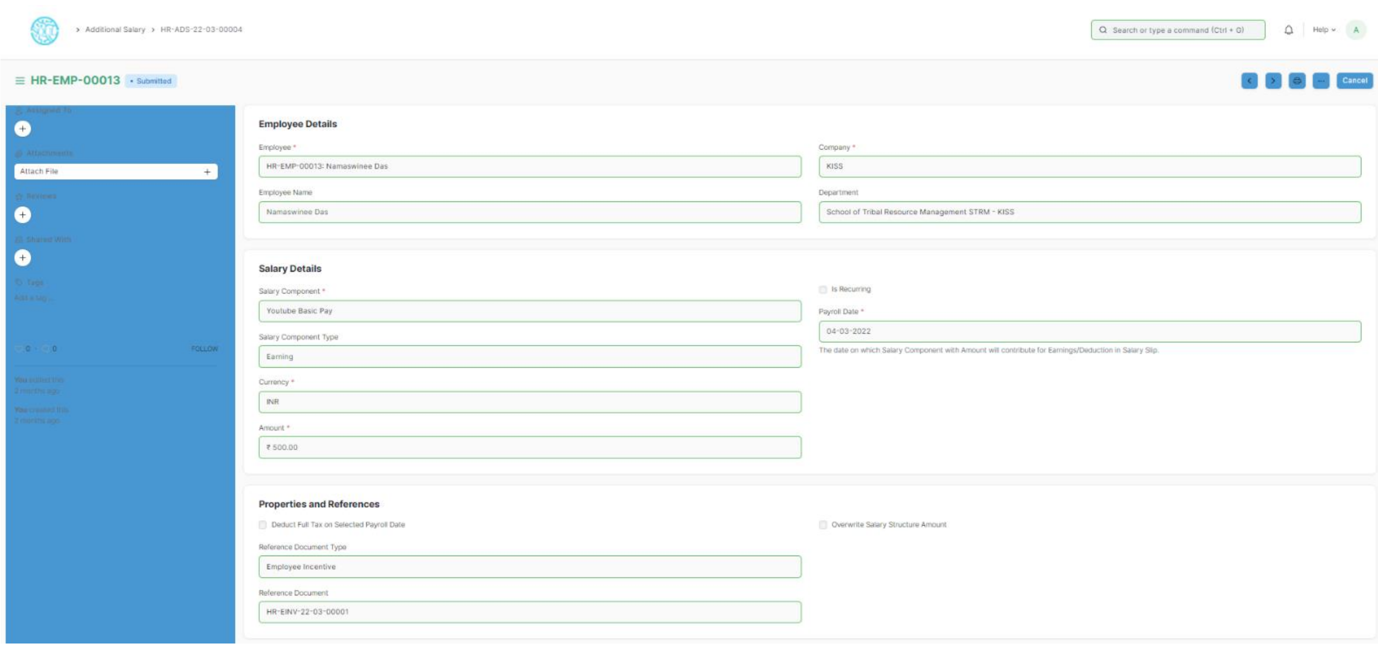
15.1 Prerequisites

Before creating an Additional Salary, it is advisable to create the following:

- Employee
- Salary Component

15.2 How to create an Additional Salary

1. Go to the Additional Salary list, click on New.
2. Select Employee.
3. Select Salary Component.
4. Enter the Amount.
5. Enter the Payroll Date. If Payroll Date for Additional Salary is in the interval when the salary is processed, it will be added to the earnings/deduction.
6. Save and Submit.



Select the 'Overwrite Salary Structure Amount' checkbox to overwrite the Additional Salary component on the Salary Structure amount. Additionally, the 'Deduct Full Tax on Selected Payroll Date' checkbox can be selected if full tax needs to be deducted on the Additional Salary component for that particular payroll date.

15.3 Features

15.3.1 Recurring Additional Salary

This feature allows users to create an Additional Salary for a fixed interval. When 'Is Recurring' is checked you need to fill 'To Date' and 'From Date'. This will add or deduct the additional salary amount for this employee within the selected date range and it will be reflected in the Salary Slip for the employee. The Additional Salary will be repeated every month between 'From Date' and 'To Date' interval.

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15.4 Related Topics

1. Retention Bonus
2. Employee Incentive
3. Salary Structure
4. Salary Structure Assignment
5. Payroll Entry
6. Payroll Period

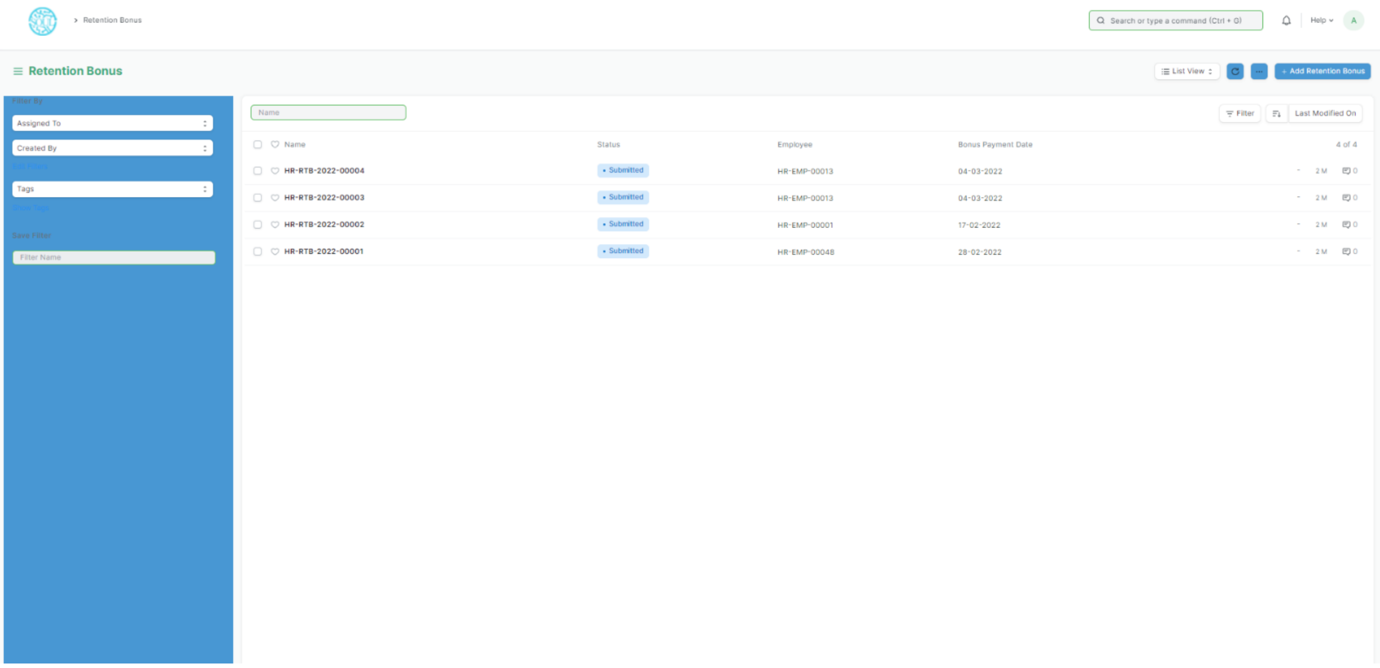
16. Retention Bonus

Retention bonus is a payment or reward outside of an employee's regular salary that is offered as an incentive to keep a key employee on the job.

EduLead allows you to configure Retention Bonus for an Employee for a particular period.

To access Retention Bonus, go to:

Home > Human Resources > Payroll > Retention Bonus



16.1 Prerequisites

Before creating a Retention Bonus, it is advisable to create the following:

- Employee
- Salary Component

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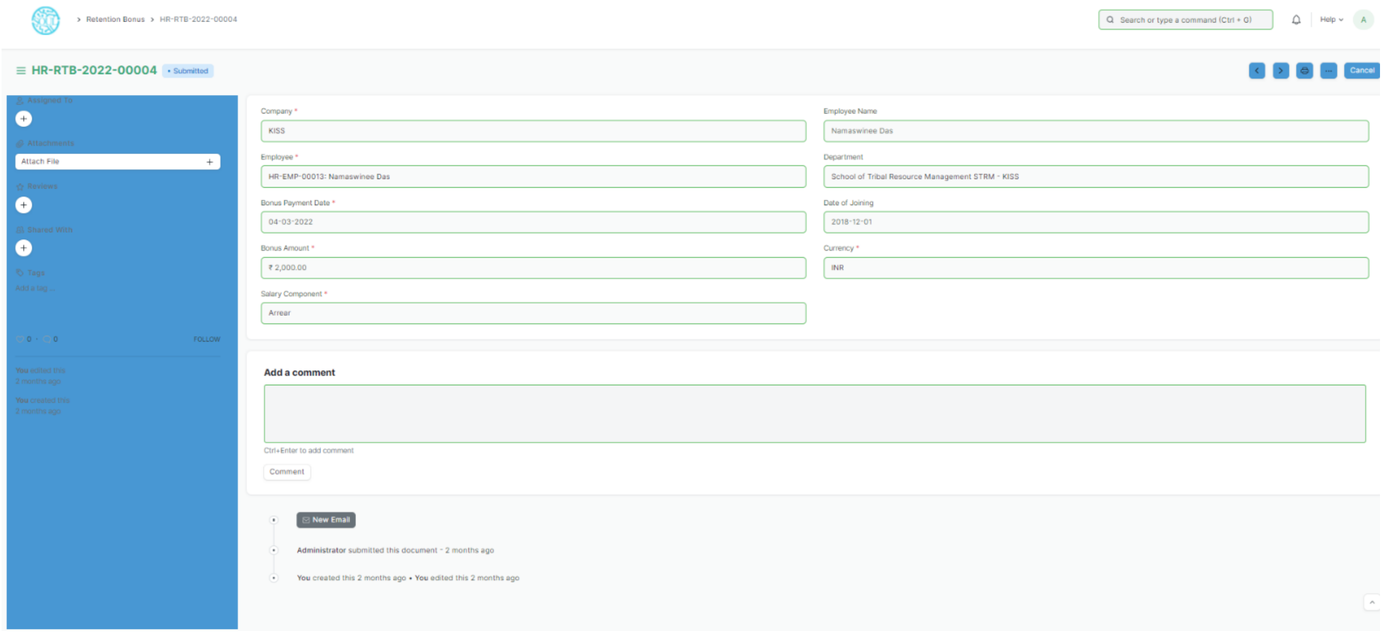
16.2 How to create a Retention Bonus

1. Go to Retention Bonus list, click on New.
2. Select Employee and Bonus Payment Date.
3. Enter the Bonus Amount.
4. Select the Salary Component under which you want to give the bonus.
5. Save and Submit.
6. On submit, 'Additional Salary' document of the specified 'Salary Component' is created. This will be fetched while running Payroll Entry.



16.3 Related Topics

1. Employee Incentive
2. Additional Salary
3. Salary Component
4. Salary Structure
5. Payroll Entry

17. Employee Incentive

Employee Incentives are a way of compensating and motivating employee performance apart from the usual salary.

When an organization wants to encourage productivity among its employees, one of the options available is rewarding the Employee with an incentive. EduLead allows you to create Employee Incentives as and when required for a particular payroll entry.

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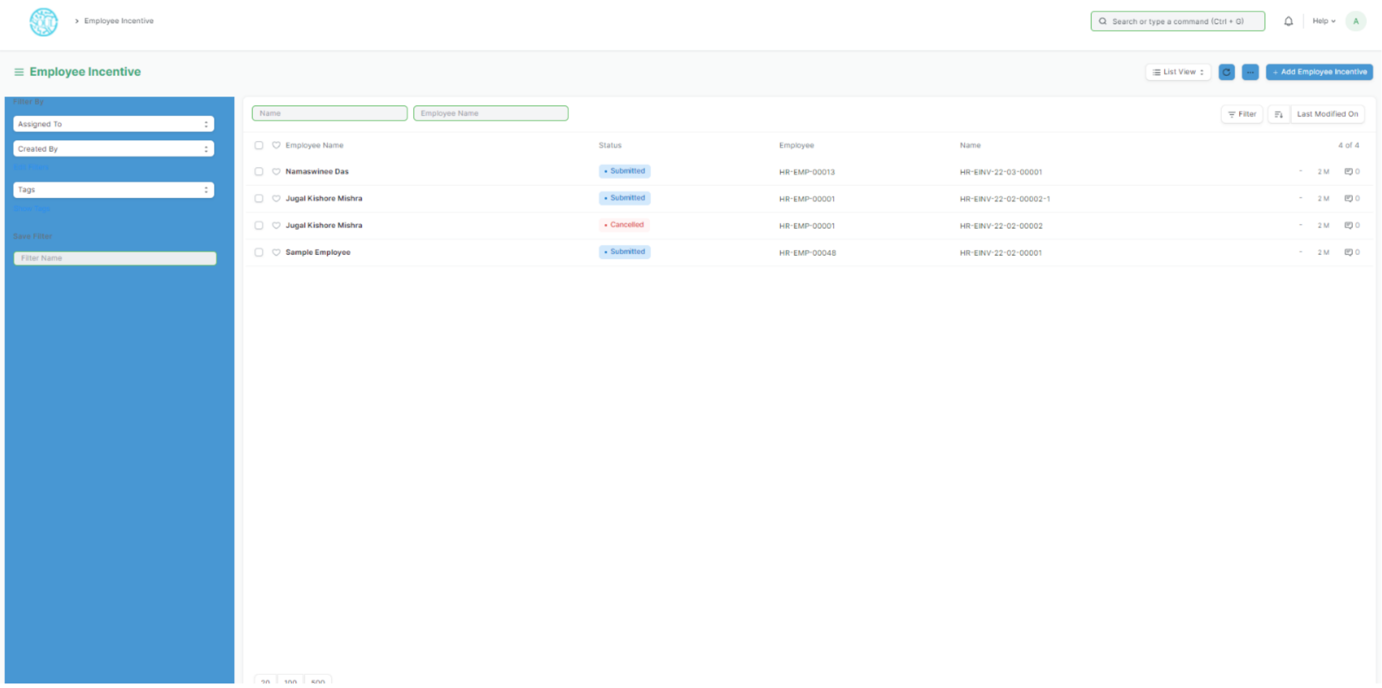
To access Employee Incentive, go to:

Home > Human Resources > Payroll > Employee Incentive

17.1 Prerequisites

Before creating an Employee Incentive, it is advisable to create the following:

- Employee
- Salary Component



17.2 How to create an Employee Incentive

1. Go to Employee Incentive list, click on New.
2. Select the Employee.
3. Enter the Incentive Amount.
4. Select the Payroll Date.
5. Select the Salary Component under which you want to give the incentive.
6. Save and Submit.
7. On submit, the 'Additional Salary' document of the specified 'Salary Component' is created. This will be fetched while running the Payroll Entry.

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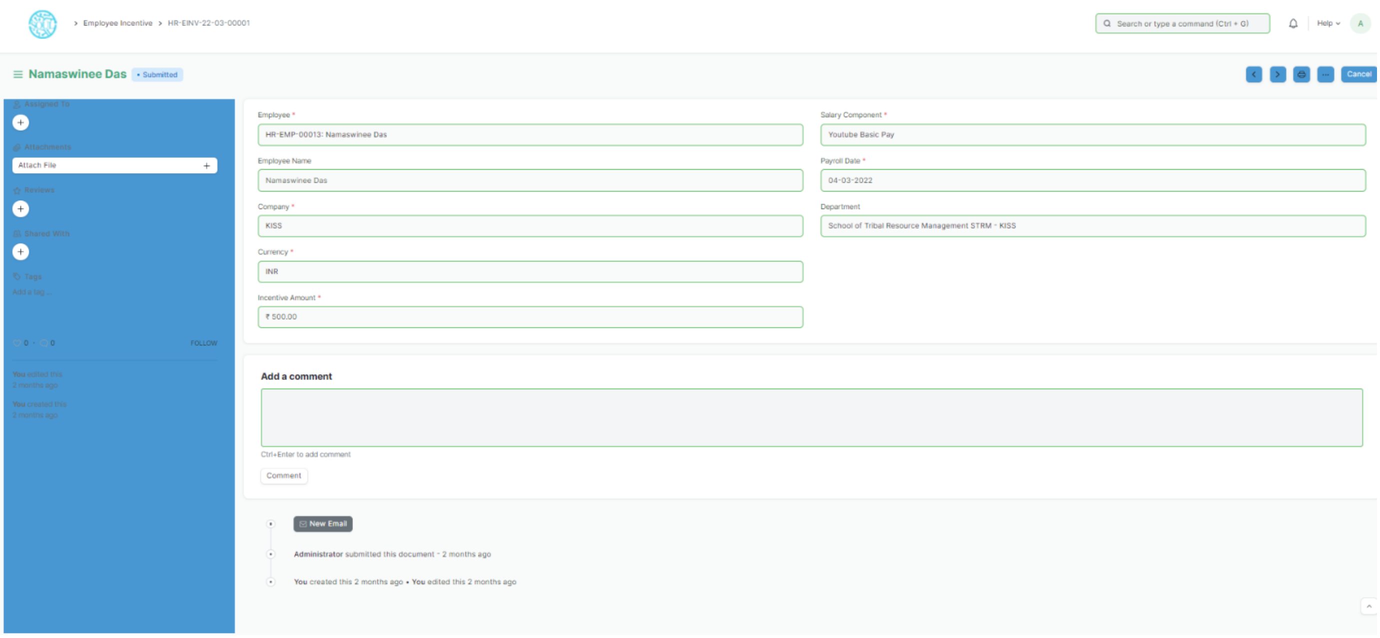

17.3 Related Topics

1. Retention Bonus
2. Additional Salary
3. Salary Component
4. Salary Structure
5. Payroll Entry

18. Setting Up Income Tax Deduction

Calculating Tax deductions for employees every month is a time-consuming activity for most businesses, especially for large enterprises. If set up properly, EduLead simplifies most of the tax-related calculations by automatically calculating tax deductions while generating Salary Slips. Here's how you can configure EduLead to ease your payroll processing -

18.1 Income Tax Exemption

In many countries, especially in India, regulations allow exempting a part (or all) of some type of spendings by individuals from being added to their annual taxable income. Examples of such spendings could be contributions to charitable institutions, the amount spent on the education of children, specific investments, etc. To avail the exemption from their taxable income, individuals are required to submit proof of such spendings.

EduLead allows you to configure Income Tax Slabs and the tax is calculated based on the projected annual earnings of the employee. For this, employees are required to declare the exemption amount they plan to claim at the start of the financial year so that the payroll deductions for tax will be calculated based on the projected annual earnings minus the exemption. Employees can declare this through Employee Tax Exemption Declaration.

If no declaration is submitted by the employee, the monthly deductions will be calculated without any exemption from the employee's annual earnings. However, if the employee submits a declaration in between the payroll period, the tax exemption will be applied from the next payroll onwards. Any additional tax collected in earlier payrolls will be adjusted in the last payroll or when using *Deduct Tax For Unsubmitted Tax Exemption Proof* in Payroll Entry or Salary Slip.

Also, at the end of the year employees submit the actual proof of the spendings for filing via Employee Tax Exemption Proof Submission. In the last payroll of the Payroll Period, EduLead checks for proof submissions of employees, and if not found, tax for the exempted income will be added to the standard deduction component.

18.2 Employee Tax Exemption Category

Exemptions from taxable salary are usually restricted to spendings on particular categories decided by government or regulatory agencies. EduLead allows you to configure various categories which are allowed to be exempted. Examples of this could be, for India, 80G, 80C, B0CC, etc.
You can configure Employee Tax Exemption Category by going to,
Human resources > Payroll Setup > Employee Tax Exemption Category > New Employee Tax Exemption Category

18.3 Employee Tax Exemption Subcategory

Under each category, there could be many heads for which the exemptions are allowed. For example, in India, subcategories under 80C could be Life Insurance Premium
You can configure Employee Tax Exemption Sub Category by going to,
Human resources > Payroll Setup > Employee Tax Exemption Sub Category > New Employee Tax Sub Exemption Category

18.4 HRA Exemption - Regional, India

For the fiscal year 2018-19, in India, House Rent Allowance (HRA) exemption from taxable earnings is the minimum of: * The actual amount allotted by the employer as the HRA. * Actual rent paid less 10% of the basic salary. * 50% of the basic salary, if the employee is staying in a metro city (40% for a non-metro city).

As part of the Employee Tax Exemption Declaration, employees shall also fill out the HRA Exemption. EduLead will calculate the exemption eligible for HRA and exempt it while calculating the taxable earnings.

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Note: Basic and HRA salary component shall be configured in Company for HRA exemption to work

18.4.1 Options in Payroll Entry and Salary Slip

EduLead simplifies payroll processing by automatically processing payroll in bulk via Payroll Entry.

- Deduct Tax For Unclaimed Employee Benefits: Flexible benefits (Salary Components which are *Is Flexible Benefit*) are not included in the taxable income of the employee. However, the amount received for these components will be included in the taxable earnings of the employee if she fails to submit Employee Benefit Claim while calculating tax in the last payroll of the Payroll Period.

If you wish to collect tax for benefits before the last payroll, check this option and EduLead will recalculate the tax and add the tax for all untaxed benefits while generating the Salary Slip.

- Deduct Tax For Unsubmitted Tax Exemption Proof: This option allows you to deduct taxes for the earnings which were exempted in previous payrolls as declared in Employee Tax Exemption Declaration but the Employee has not submitted sufficient proof via Employee Tax Exemption Proof Submission. It is to be noted that if this option is checked EduLead does not consider the Employee Tax Exemption Declaration by employees and will only take into account *Employee Tax Exemption Proof Submission* instead while calculating exemption from employees' annual earnings.

Note: If required, you can still process payroll for employees individually, by manually creating a new Salary Slip and both these options are made available in the Salary Slip

19. Income Tax Slab

Income Tax Slab helps you define Tax slabs applicable for the period, making it easier to manage changing laws. You can add multiple tax slabs for the payroll period depending on the tax regulations. Note that you can use fields in Employee document in the *Condition* field to apply tax slabs based on attributes of employees.

20. Salary Component

To enable automatic tax deduction based on Tax slabs configured in Income Tax Slab, you have to configure a Salary Component of type *Deduction* with *Variable Based On Taxable Salary* option enabled. This checkbox enables auto calculation of Income Tax considering the tax slabs and

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declaration submitted by an employee. The tax will be calculated annually on the remaining taxable salary and equally divide it in 12 months.

Important Note: If you configure condition and formula for this Deduction component, the condition and formula will be considered for calculating the Salary Component and the Tax Slabs configured in Income Tax Slab will be ignored. However, you can still use *Deduct Tax For Unsubmitted Tax Exemption Proof* option in Payroll Entry / Salary Slip to deduct taxes based on the Tax Slabs configured in Income Tax Slab, exempting Employee Tax Exemption Proof Submission which will give precedence to the Tax Slab based tax deduction. This is particularly helpful if you need to deduct a fixed amount as a deduction in each payroll rather than EduLead automatically calculating the deductions based on the projected annual salary of the employee after exemption as declared by the employee via Employee Tax Exemption Declaration. At the end of the fiscal year, you can still use *Deduct Tax For Unsubmitted Tax Exemption Proof* to deduct the remaining tax liability of the employee for the whole period.

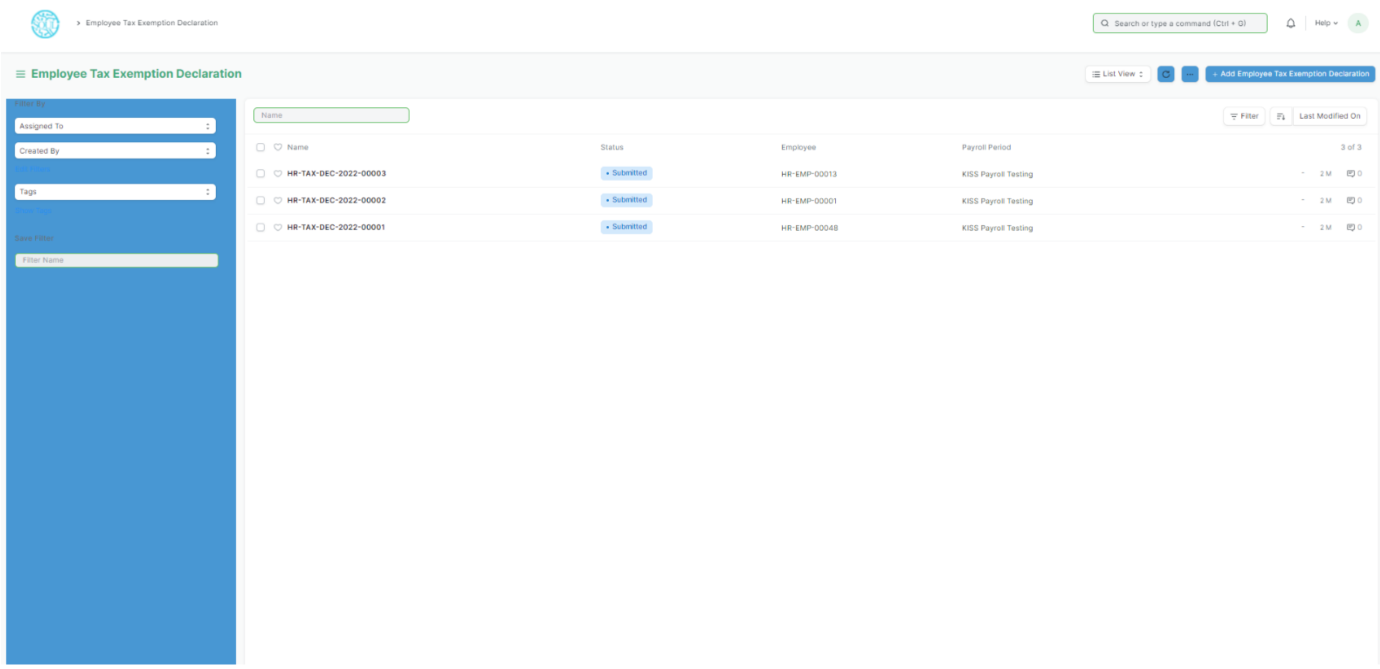
21. Employee Tax Exemption Declaration

Tax exemption is the monetary exemption of income, property or transactions from taxes that would otherwise be levied on an Employee.

At the beginning of a Payroll Period, employees can declare the amount of exemption they will be claiming from their taxable salary. EduLead allows you to specify tax exemption category/sub-category, tax exemption amount and other related information in the Employee Tax Exemption Declaration form.

To access Employee Tax Exemption Declaration, go to:

Home > Human resources > Employee Tax and Benefits > Employee Tax Exemption Declaration



21.1 Prerequisites

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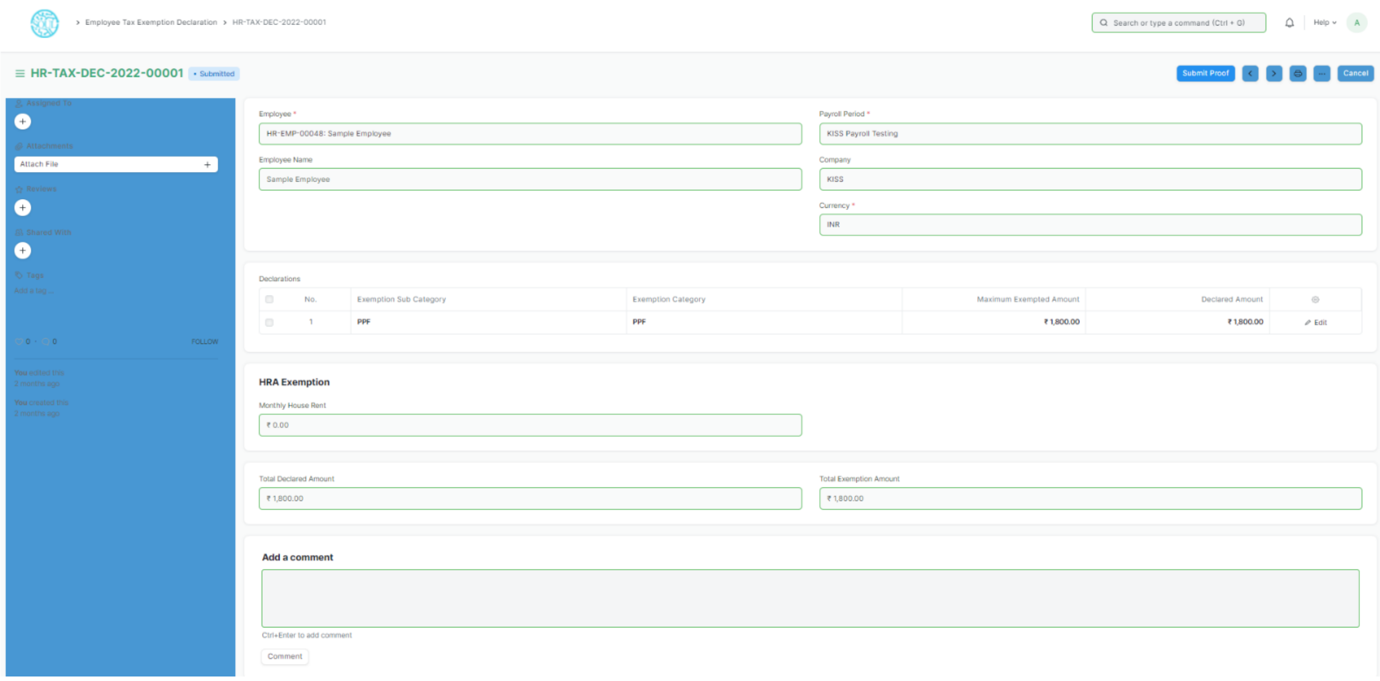
Before creating an Employee Tax Exemption Declaration, it is advisable you create the following:

- Employee
- Employee Tax Exemption Category
- Employee Tax Exemption Sub Category

21.2 How to create Employee Tax Exemption Declaration

To create a new Employee Tax Exemption Declaration:

1. Go to: Employee Tax Exemption Declaration > New.
2. Select the Exemption Sub Category and Exemption Category.
3. Enter the Maximum Exemption Amount and Declared Amount.
4. Save and Submit.



The Total Exemption Amount will be exempted from annual taxable earnings of the employee while calculating the tax deductions in Payroll.

Note: Employees can only submit one Employee Tax Exemption Declaration for a Payroll Period.

21.3 Features

21.3.1 Employee Tax Exemption Category

Exemptions from taxable salary are usually restricted to spendings on particular categories decided by the Government or regulatory agencies. EduLead allows you to configure various

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categories which are allowed to be exempted. Examples of these (for India) could be, 80G, 80C, B0CC etc.

You can configure Employee Tax Exemption Category by going to, Employee Tax and Benefits > Employee Tax Exemption Category

21.3.2 Employee Tax Exemption Sub-Category

Under each category, there could be many heads for which the exemptions are allowed. For example, in India, sub categories under 80C could be Life Insurance Premium

You can configure Employee Tax Exemption Category by going to, Employee Tax and Benefits > Employee Tax Exemption Sub-Category

21.3.3 HRA Exemption (Regional - India)

For the current fiscal year, in India, House Rent Allowance (HRA) exemption from taxable earnings is the minimum of:

- The actual amount allotted by the employer as the HRA.
- Actual rent paid less 10% of the basic salary.
- 50% of the basic salary, if the employee is staying in a metro city (40% for a non-metro city).

As part of the Employee Tax Exemption Declaration, employees can also fill out the HRA Exemption. EduLead calculates the exemption eligible for HRA and exempts it while calculating the taxable earnings.

Enter the Monthly House Rent and check the 'Rented in Metro City' checkbox if applicable and submit the form. The Annual and Monthly HRA Exemption will be automatically calculated.

Once the declaration is submitted, you can submit the proof of your tax exemption by clicking on the *Submit Proof* button.

Note: HRA component needs to be configured in Company master under HRA Settings sections for the HRA exemption to work.

21.4 Related Topics

1. Employee Tax Exemption Proof Submission
2. Employee Benefit Application
3. Employee Benefit Claim

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22. Employee Tax Exemption Proof Submission

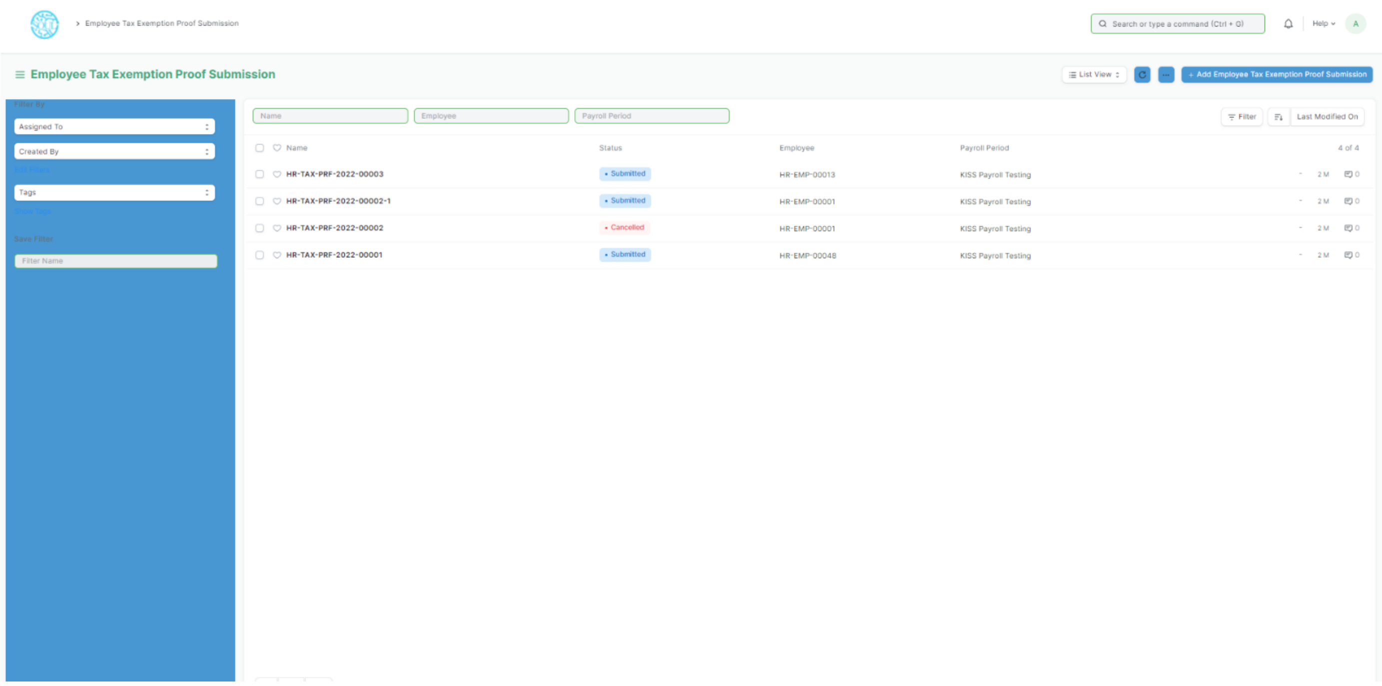
Employees are required to submit proofs for all the spendings they claim tax exemption for. This can be done through the Employee Tax Exemption Proof Submission document

This is usually done at the end of a Payroll Period, but employees can submit any number of proofs unlike Employee Tax Exemption Declaration.

Note: Create an Employee Tax Exemption Declaration before creating an Employee Tax Exemption Proof Submission

To access Employee Tax Exemption Proof Submission, go to:

Home > Human resources > Employee Tax Exemption Proof Submission



22.1 How to create an Employee Tax Exemption Proof Submission

The details are already fetched if you click on 'Submit Proof' from Employee Tax Exemption Declaration. However, if you want to create an 'Employee Tax Exemption Proof Submission' manually, follow these steps.

1. Go to the Employee Tax Exemption Proof Submission list, click on New.
2. Enter the details as needed.
3. Additionally, enter the 'Type of Proof' (documents, receipts, etc.).
4. Attach the proofs in by clicking on the Attach button at the bottom.
5. Enter House Rent Payment Amount, Rented From Date and Rented To Date.
6. Save and Submit.

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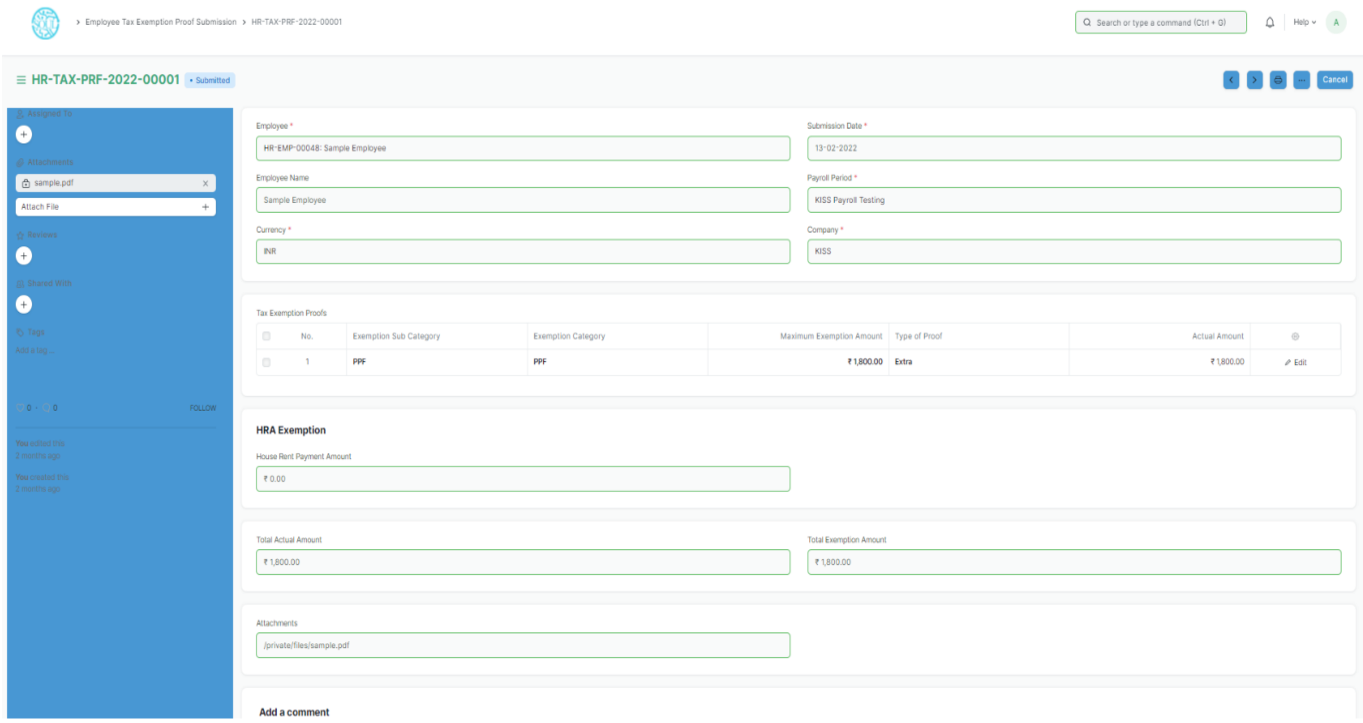

The *Total Exemption Amount* will be exempted from annual taxable earnings of the employee while calculating the tax deductions in the last payroll.

Note: Even if employees submit exemption proofs anytime during the payroll period, EduLead will only consider this in the last payroll of the Payroll Period for adjusting the final taxes based on the proof submitted. If you need to adjust any additional tax collected or consider proof submission of employees anytime before the last payroll, while processing Payroll Entry (or in the Salary Slip of the employee) check the *Deduct Tax For Unsubmitted Tax Exemption Proof* option.

Regional - India

For the current fiscal year, in India, House Rent Allowance (HRA) exemption from taxable earnings is the minimum of:

- The actual amount allotted by the employer as the HRA.
- Actual rent paid less 10% of the basic salary.
- 50% of the basic salary, if the employee is staying in a metro city (40% for a non-metro city).

As part of the Employee Tax Exemption Proof Submission, employees shall also submit proof for HRA Exemption. EduLead will calculate the exemption eligible for HRA and exempt it while calculating the taxable earnings in the last payroll of the Payroll Period.

Note: HRA component shall be configured in Company for HRA exemption to work

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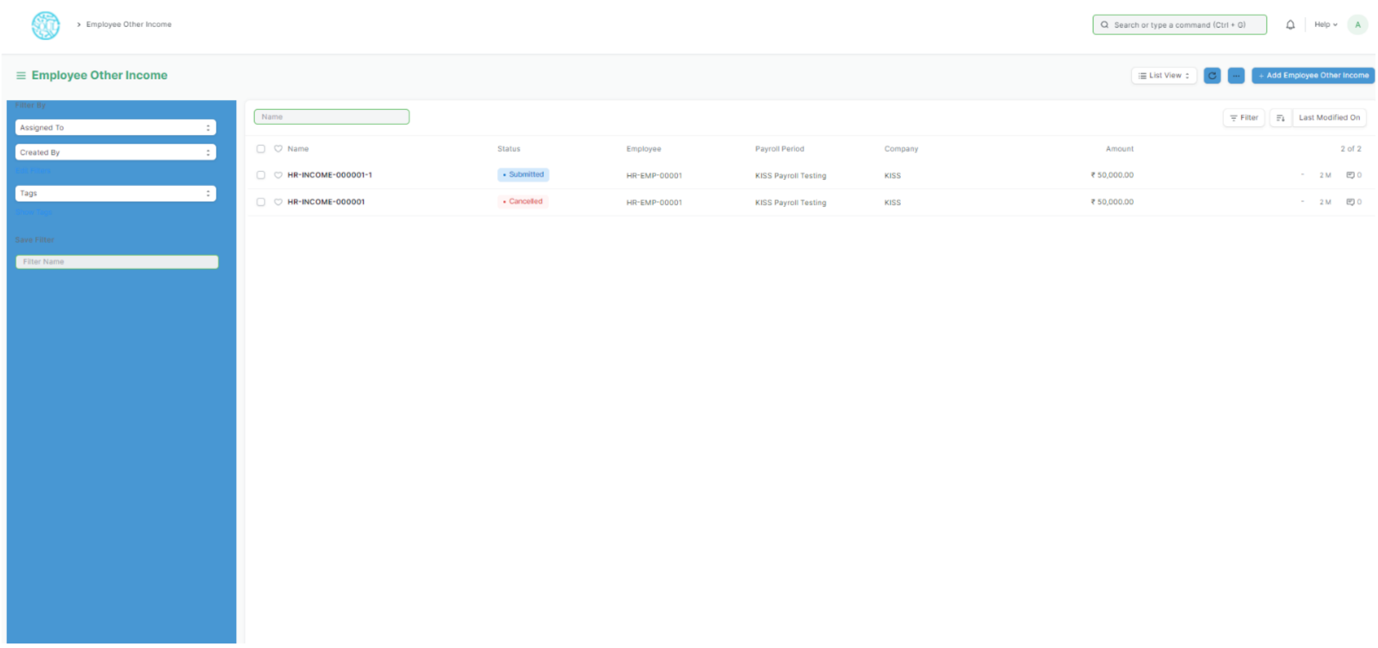
23. Employee Other Income

Employee Other Income is a document to declare other income of an employee from different sources.

Other income of an employee is also important to calculate the income tax liability of an employee. In EduLead, an employee can declare their other income using this document.

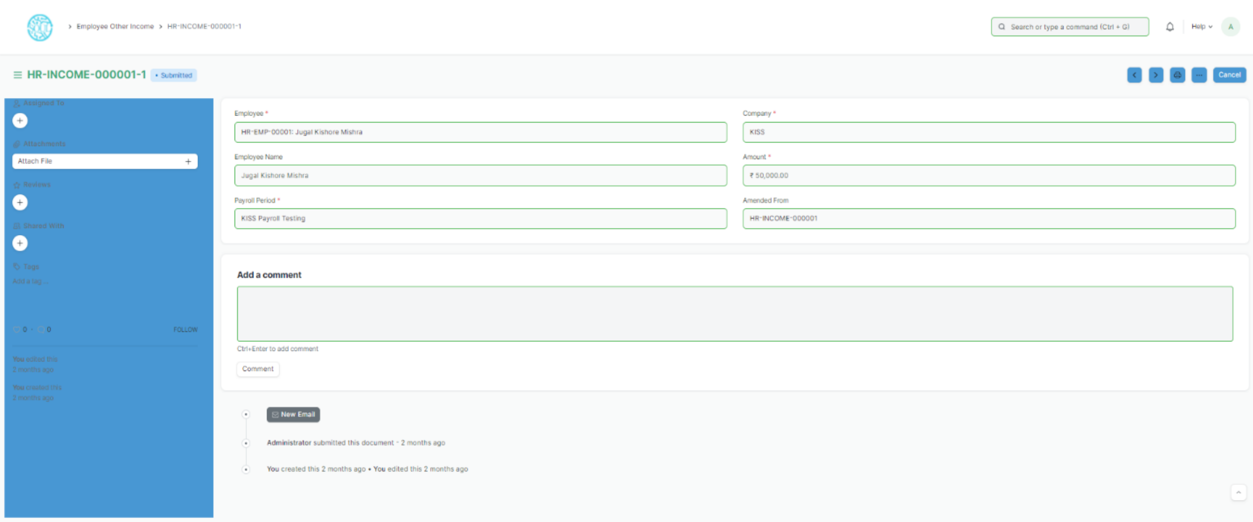
To access Employee Other Income, go to:

Home > Human Resources > Employee Tax and Benefits > Employee Other Income



23.1 How to create an Employee Other Income

1. Go to: Employee Other Income > New.
2. Select the Employee and Company.
3. Select the Payroll Period.
4. Enter the Amount and its Source.
5. Save and Submit.



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23.2 Related Topics

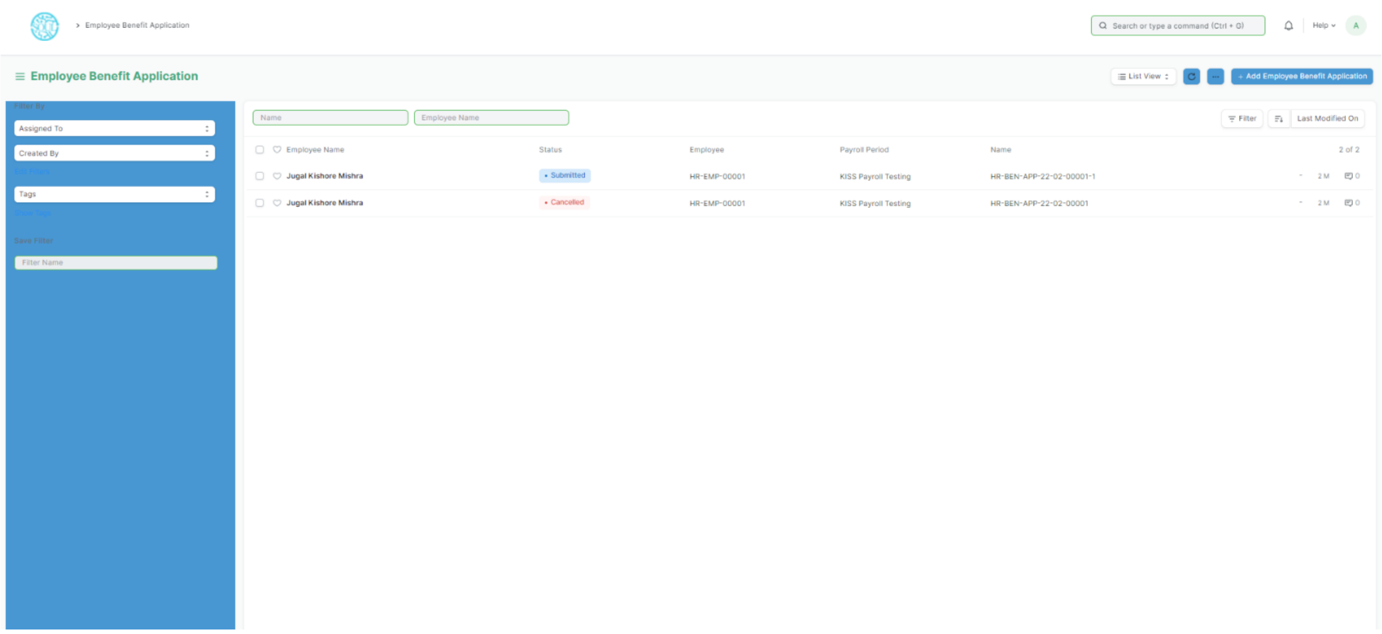
1. Salary Structure
2. Salary Structure
3. Payroll Entry

24. Employee Benefit Application

Employees are entitled to flexible benefits which they can either receive pro-rata (as part of their Salary) or as a lump-sum amount when they claim the benefit. In order to choose from various flexible benefits which an Employee shall receive on a pro-rata basis, the employee should create a new Employee Benefit Application.

To create a new Employee Benefit Application,

Human Resources > Payroll > Employee Benefit Application > New Employee Benefit Application



Here, Employee can view the Max Benefits as per the Salary Structure Assignment and then chose from the Earning Components which are part of the employee's assigned Salary Structure. They can also enter the amount which they wish to receive as part of their Salary Slip.

It is based on the Employee Benefit Application that the Max Benefit Amount will be distributed among the flexible earning components while generating the Salary Slip. If an Employee fails to submit the Employee Benefit Application before processing the payroll, the Max Benefit Amount eligible to the employee will be distributed proportionately to each of the flexible component present in the Employee's salary structure.

Note: Employees can only submit one Employee Benefit Application for a Payroll Period.

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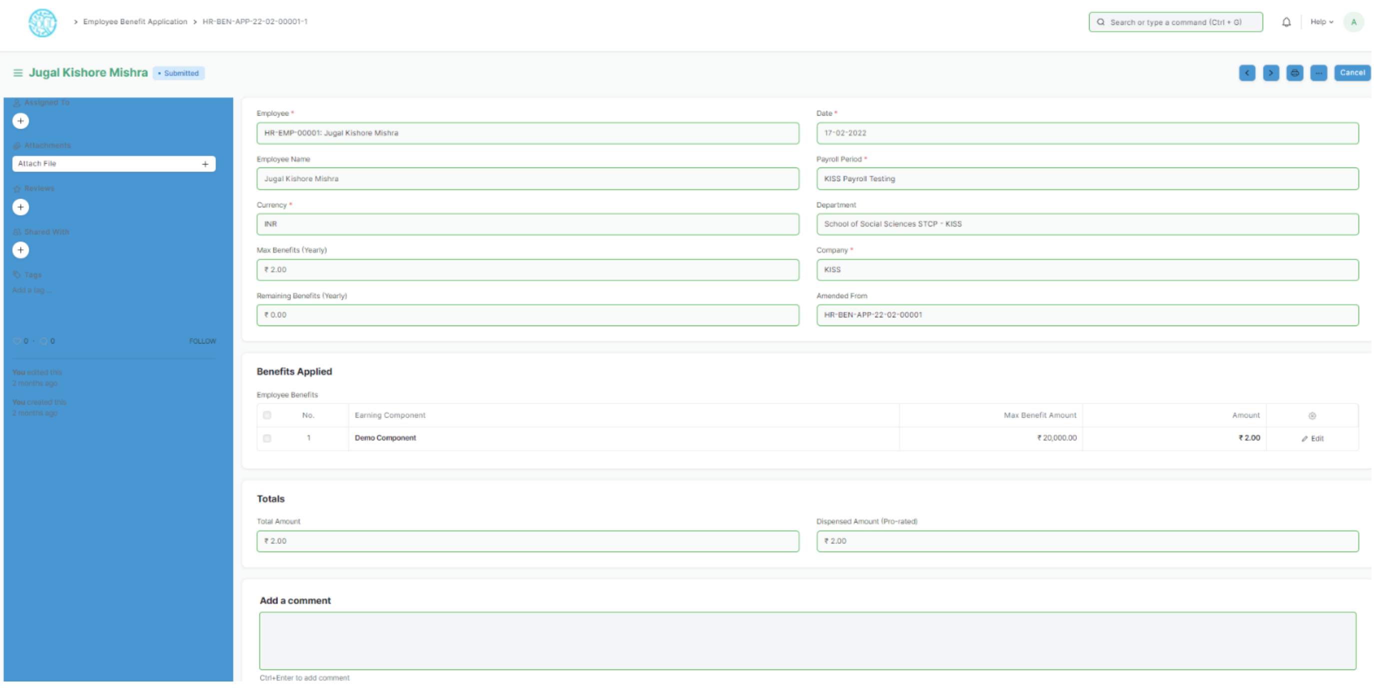
Employee Benefit Application should cover the full amount which the employee has to receive as per the Max Benefit amount on a pro-rata basis. However, if the Salary Structure of the employee consists of Salary Components which are to be paid on Employee Benefit Claim (Salary Component with *Pay Against Benefit Claim*), they are allowed to submit Employee Benefit Application excluding the amount allocated for such components.

Also, note that those components which are to be received based on Employee Benefit Claims can also be part of the application, but will only be disbursed lump-sum, as part of their salary when the Employee submits a claim for it.

Note: Normal Tax calculation does not include Flexible Benefits as in most cases these are exempted from Tax. To tax these components anytime before the last payroll, use *Deduct Tax For Unclaimed Employee Benefits* in Payroll Entry / Salary Slip while processing the Salary.



25. Employee Benefit Claim

Employee Benefit Claim allows Employees to - 1. Claim flexible benefits which are to be received lump-sum (if Salary Component is *Pay Against Benefit Claim*) 2. Claim tax exemption for flexible benefits received pro-rata, as part of salary when *Deduct Tax For Unclaimed Employee Benefits* is checked in Payroll Entry / Salary Slip

You can create a new Employee Benefit Claim by going to,

Human Resources > Payroll > Employee Benefit Claim > New Employee Benefit Claim

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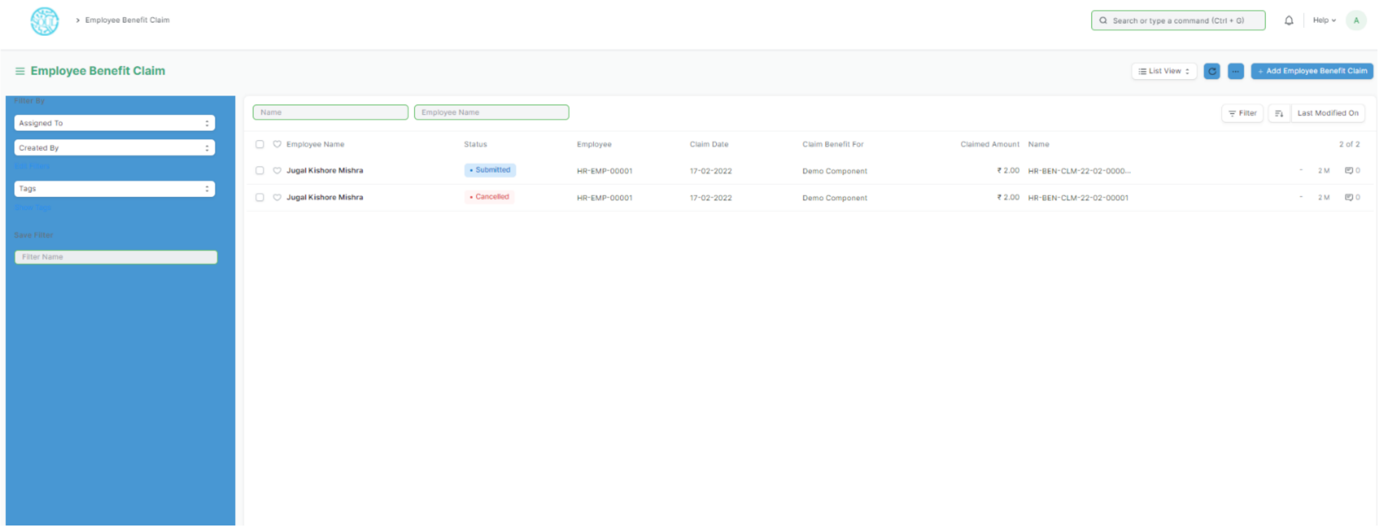
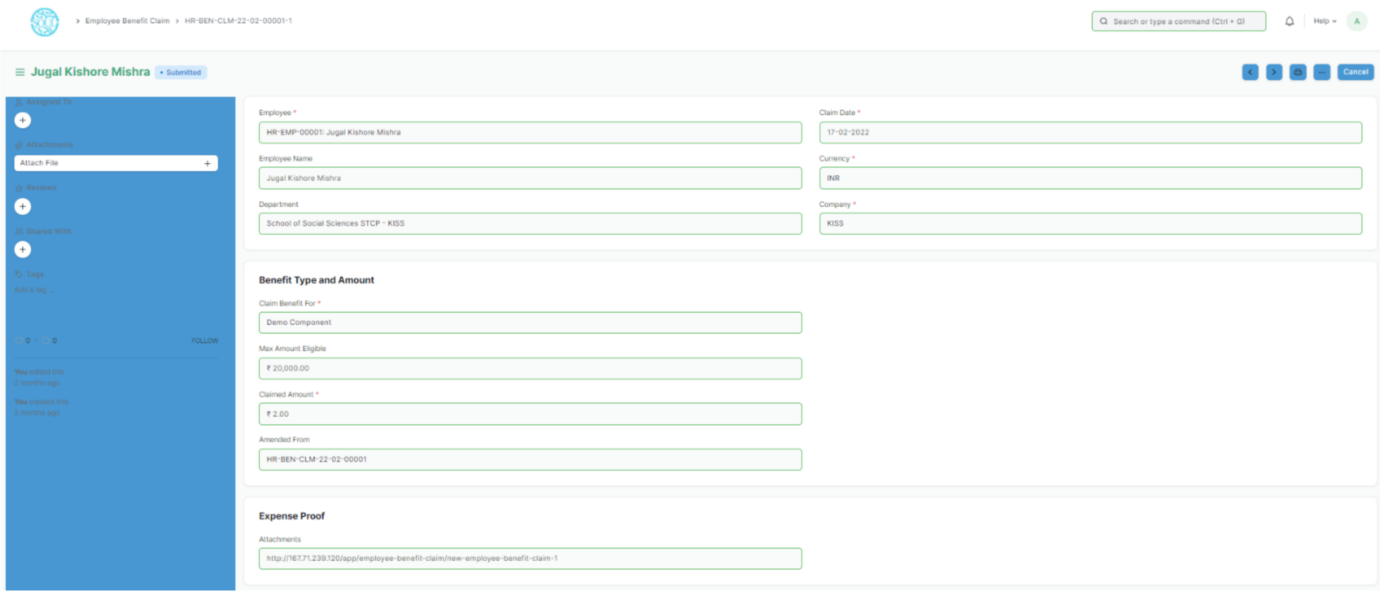


Here, Employee can view the eligible amount as per their Salary Structure Assignment and claim for the amount which they wish to receive as part of their next Salary. Any remaining amount which the employee did not claim for, in a Payroll Period, will be disbursed as part of the last payroll Salary.



Note: Normal Tax calculation does not include Flexible Benefits as in most cases these are exempted from Tax. To tax these components anytime before the last payroll, use *Deduct Tax For Unclaimed Employee Benefits* in Payroll Entry / Salary Slip while processing the Salary.

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