Internal Portal

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# INTRODUCTION

This This document outlines the design for the internal portal, which primarily consists of:

1. Company Master
2. Employee Master
3. Vendor Master
4. Customer Master
5. Project Master
6. Timesheet
7. Various Reports

Additionally, we will include the following items in the second phase:

1. Invoice Processing
2. Resume Master
3. Vendor Invoicing
4. Leave Module

# COMPANY MASTER

Below mentioned fields are required in the Company Code Master:

1. Company Code
2. Company Name
3. Company Address
4. GSTN
5. PAN Card Number
6. Contact Person Name
7. Contact Person Number
8. Payment Terms
9. Bank Name
10. Account Name
11. Bank Account Number
12. IFSC Code
13. MICR

# VENDOR MASTER

The Vendor Master consists of the following details:

1. Company Code
2. Vendor Name
3. Address
4. GSTN
5. PAN Card( in place of age)
6. Contact Person Name
7. Contact Person Number
8. Payment Terms
9. GSTN Upload (In place of adhare card)
10. PAN Card Upload

Account Details:

1. Name
2. Account Number 1
3. IFSC Code
4. Account Name
5. Cancelled Cheque Upload

Agreements Upload:

1. Agreements Upload – 1
2. Agreements Upload - 2
3. Agreements Upload - 3
4. Agreements Upload - 4

# CUTOMER MASTER

The Customer Master consists of the following items:

1. Company Code
2. Customer Name
3. Address
4. Country
5. GSTN
6. PAN Card
7. Contact Person Name
8. Contact Person Number
9. Payment Terms

Agreements Upload:

1. Agreements Upload - 1
2. Agreements Upload - 2
3. Agreements Upload - 3
4. Agreements Upload – 4

# EMPLOYEE MASTER

The Employee Master consists of the following items:

Employee Master

1. Employee Type: C2H, Freelancing, Permanent, Client Payroll (Configurable), **Commission**
2. Company Code
3. Name
4. Alternative Name
5. Age
6. Skill Set
7. Experience
8. Timing Availability: EU, INDIA, US, AU
9. Contact Number 1
10. Contant Number 2
11. Remarks
12. Referred By
13. Created By (Login Mail ID)
14. NDA Upload
15. Vendor Profiles (Vendor Code)

Account Details

1. Upload Aadhar Card
2. PAN Card and Upload PAN Card (in case of vendor, Auto Fetch from Vendor Master)
3. Account Number 1 (in case of vendor, Auto Fetch from Vendor Master)
4. IFSC Code (in case of vendor, Auto Fetch from Vendor Master)
5. Account Name (in case of vendor, Auto Fetch from Vendor Master)
6. Cancelled Cheque 1 Upload (in case of vendor, Auto Fetch from Vendor Master)
7. Age

Additional Account Details

1. Upload Aadhar Card
2. PAN Card (Upload PAN Card)
3. Account Number 2
4. IFSC Code
5. Account Name
6. Cancelled Cheque 2 Upload
7. Age
8. Cancelled Cheque 1 (Upload)

\*\* Change name to PAN CARD NUMBER

# PROJECT MASTER

The Project Master consists of the following header and employee details:

Header Details

1. Project Code
2. Project Description -
3. Project Start Date
4. Project End Date
5. Project Customer
6. Customer Rate (Inpalce of revune)
7. Rate Unit
8. HS Code
9. Text Fields
10. Timesheet Approval Level – One or Two
11. Status

Employee Details

1. Employee Number: Employee code drilldown
2. Employee Name: Fetch Automatically from employee master
3. Employee Type – Fetch from Master Data
4. Technology – Configurable (SAP and NONSAP)
5. Allocation Type – Fixed, T&M, Monthly, 50% Allocation
6. **Commission** Type – Fixed or based on data
7. Consultant Rate –
8. Rate Unit
9. Timesheet Type – Monthly, Quarterly, Project Based, Fixed
10. SAP Module - Configurable
11. Employee Start Date in place of project start date and end date –
12. Employee End Date – 30 May
13. Timesheet Cycle Start Day - 26
14. Timesheet Cycle End Day - 25
15. Mode of Payment: Online or Cash or UPI (Configurable)
16. Timesheet Yes or no
17. Customer Rate (Inpalce of revune)
18. Rate Unit
19. Inactive
20. Salary Payment Days
21. TDS %
22. Account Number : Account Details 1 or Account Details 2 , Fetch details from employee master by default slect account detail 1 , In place of remarks
23. Text Fields

Edit options should be available along with delete

# TIMSHEET

The Timesheet consists of three main sections: Timesheet Update, Timesheet Submit and Timesheet Report. Each section includes the following details:

#### Timesheet Update:

The Timesheet Update will be built based on logic derived from various Project Master fields. The logic includes the following considerations:

1. Employee Start Date and Employee End Date: These fields ensure that the timesheet entries fall within the employee's tenure.
2. Timesheet Type: Determines whether the timesheet is updated monthly, quarterly, or for the entire project duration.
3. Monthly: Timesheet entries are updated on a monthly basis. Timesheet Start Date and Timesheet Cycle Start Day: These fields define the start date and end date for the timesheet cycle.

Format of Timesheet:

Monthly

Project Code:

|  |  |
| --- | --- |
| Timesheet Month | Month and Year Options |

Input from consultant:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Date | Day | Hours | Short Deceptions | Locations (Configurable) | **Attendance** | **Extra Days** |
| Auto fetched based on above logic | Auto fetched based on date | Manual Input from Consultant | Manual Input from Consultant | Manual Input from Consultant | * Working * Full day Leave * Half Day leaves * Weekly Off * Holiday * Optional Holiday | * Extra days with comp off * Extra days without comoff |
|  |  |  |  |  | Drill down |  |

1. Project Duration: Timesheet entries are updated for the entire duration of the project. Start date and end date will be project durations

Employee start date and End date

1. Quarterly: Timesheet entries are updated every three months.

|  |  |
| --- | --- |
| Timesheet Quarterly | From Month to Month and Year Options |

Input from consultant:

Format of Timesheet: Upload as par attached format



1. Fixed : based on start date and end date of employee

#### Timesheet Submitt:

Based on below mentioned various options should be available for timesheet submit:



#### Timesheet Report:

# VARIOUS REPORT

WM –

Q –

Project

Cutomer

All unpaid, Saleay paid

Employe name or number

**Timesheet Status –** Save, Submitted, Approved, Invoice, Salary Paid, Salary and TDS Paid