

Module: Human Resources

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The Human Resources (HR) module covers the processes related to the HR department of a company. 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. ERP+ accommodates all types of taxes and their calculation.

It also maintains a complete employee database including contact information, salary details, attendance, performance evaluation, leaves, and appraisal records.

1. Topics

1.1 Setup

1. Employee
2. Employment Type
3. Designation
4. Employee Grade
5. Branch
6. Department
7. Daily Work Summary Group
8. Health Insurance
9. Staffing Plan
10. HR Settings

1.2 Recruitment

1. Staffing Plan
2. Job Opening
3. Job Applicant
4. Job Offer

1.3 Employee Management

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2. [Training](#)
3. [Daily Work Summary](#)
4. [Shift Management](#)
5. [Employee Lifecycle](#)

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3. Leave Period
4. Leave Policy
5. Leave Allocation
6. Leave Application
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8. Leave Encashment
9. Holiday List
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3. Upload Attendance
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3. Employee Promotion
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4. Fleet Management
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2. Articles

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2. Working Days in Salary Slip

1.1 Topic: **Setup**

1. Employee
2. Employment Type
3. Designation
4. Employee Grade
5. Branch
6. Department
7. Daily Work Summary Group
8. Health Insurance
9. Staffing Plan
10. HR Settings

1. Employee

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

In ERP+, you can manage Employee master. The Employee master captures demographics, personal and professional details.

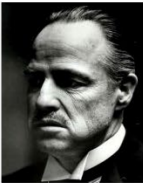
You can further use this Employee master for performing various HR functions like:

1. Processing Payroll
2. Leave Allocation and Application
3. Employee Advance and Expense Claim
4. Loan Application
5. Performance Appraisal

New Employee

To create new Employee, go to: Human Resources > Employee > New Employee

Vito Corleone ● Active
EMP/00001 📄 Menu Save



Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Godfather15_flip.jpg ✕
Attach File +

TAGS
Add a tag ...

SHARED WITH
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DASHBOARD ▼

<p>Salutation <input type="text" value="Mr"/></p> <p>Full Name <input type="text" value="Vito Corleone"/></p> <p>Company <input type="text" value="Woodcraft Decors"/></p> <p>User ID <input type="text" value="vito.corleone@mujidecor.com"/> <small>System User (login) ID. If set, it will become default for all HR forms.</small></p> <p><input checked="" type="checkbox"/> Create User Permission <small>This will restrict user access to other employee records</small></p>	<p>Date of Joining <input type="text" value="05-01-2008"/></p> <p>Date of Birth <input type="text" value="05-01-1980"/> <small>You can enter any date manually</small></p> <p>Gender <input type="text" value="Male"/></p>
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EMPLOYMENT DETAILS

<p>Status <input type="text" value="Active"/></p> <p>Employment Type <input type="text" value="Full-time"/></p>	<p>Offer Date <input type="text" value="05-01-2008"/></p> <p>Confirmation Date <input type="text" value="05-18-2018"/></p>
---	--

Employee Deputation

Once an Employee is created, you can update Department, Designation, Employee to whom he/she will report to etc.

JOB PROFILE

Branch

New Jersey

Department

Research & Development

Designation

Researcher

Notice (days)

30

Salary Information

Salary Mode

Bank

Bank Name

Citi Bank

Bank A/C No.

97784857856

ORGANIZATION PROFILE

Reports to

EMP/00002

The first Leave Approver in the list will be set as the default Leave Approver

<input type="checkbox"/>	Leave Approver	
<input type="checkbox"/>	1 michael.corleone@woodcraft.com	▼
Add Row		

2. Employment Type

Various employment contracts you have with your employees.

Employment Type List		Menu ▾	Refresh	New
Report Assigned To Me TAGS No records tagged.	<input type="checkbox"/> Add Filter			
	<input type="checkbox"/> * Title	Employment Type		
	<input type="checkbox"/> * Apprentice	Apprentice	13 d	0
	<input type="checkbox"/> * Intern	Intern	13 d	0
	<input type="checkbox"/> * Piecework	Piecework	13 d	0
	<input type="checkbox"/> * Commission	Commission	13 d	0
	<input type="checkbox"/> * Contract	Contract	13 d	0
	<input type="checkbox"/> * Probation	Probation	13 d	0
	<input type="checkbox"/> * Part-time	Part-time	13 d	0
	<input type="checkbox"/> * Full-time	Full-time	13 d	0

3. Designation

Designations in your organization

Designation List		Menu ▾	Refresh	New
Report	Add Filter			
Assigned To Me				
TAGS				
No records tagged.				
<input type="checkbox"/> * Title	Designation			
<input type="checkbox"/> * Researcher	Researcher	13 d		
<input type="checkbox"/> * Designer	Designer	13 d		
<input type="checkbox"/> * Software Developer	Software Developer	13 d		
<input type="checkbox"/> * Head of Marketing and Sales	Head of Marketing and Sales	13 d		
<input type="checkbox"/> * Project Manager	Project Manager	13 d		
<input type="checkbox"/> * HR Manager	HR Manager	13 d		
<input type="checkbox"/> * Business Development Manager	Business Development Manager	13 d		
<input type="checkbox"/> * Administrative Officer	Administrative Officer	13 d		
<input type="checkbox"/> * Associate	Associate	13 d		
<input type="checkbox"/> * Secretary	Secretary	13 d		

4. Employee Grade

ERP+ allows you to configure employee grades, helping you to easily categorize employees based on seniority or any other criteria. Employee Grades also helps you fetch employee records in bulk based on their grades while processing payroll, allocating leaves etc.

GS-9 Menu ▾ Save

Comments 0

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


Default Leave Policy

Default Salary Structure

5. Branch

Branches of your organization

Branch List Menu ▾ Refresh New

Report	
Assigned To Me	
TAGS 	
No records tagged.	
Add Filter	
<input type="checkbox"/> ★ Name	Branch
<input type="checkbox"/> ★ Chennai	Chennai 2 m  
<input type="checkbox"/> ★ Kolkata	Kolkata 2 m  
<input type="checkbox"/> ★ Delhi	Delhi 3 m  
<input type="checkbox"/> ★ Mumbai	Mumbai 3 m  

6. Department

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

Operations - AC Enabled Menu Save

Comments 0

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TAGS
Add a tag ...

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You edited this a few seconds ago

You created this 2 days ago

Department
Operations

Parent Department
All Departments

Company
Awesome Care

Is Group
 Disabled

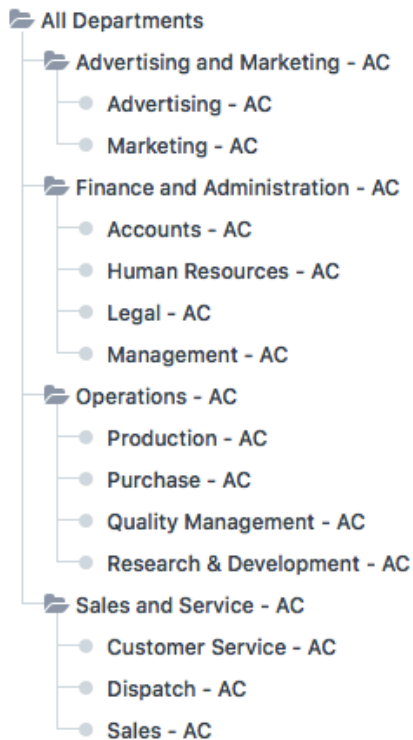
Leave Block List
2018 - Leave Blocklist
Days for which Holidays are blocked for this department.

LEAVE APPROVERS
The first Leave Approver in the list will be set as the default Leave Approver.

<input type="checkbox"/>	Approver	
<input type="checkbox"/>	1 tom@awesome.com	

Add Row

It is also possible for you to create and group departments as depicted below.



7. Daily Work Summary Group

In order to facilitate daily reporting of employees, you can configure ERP+ to request employees email to send their work summary. To configure a new Daily Work Summary Group, go to: Human Resources > Setup > Daily Work Summary Group

You can set multiple groups with different set of *users* from your user list with different time to send emails and with separate holiday list for each.

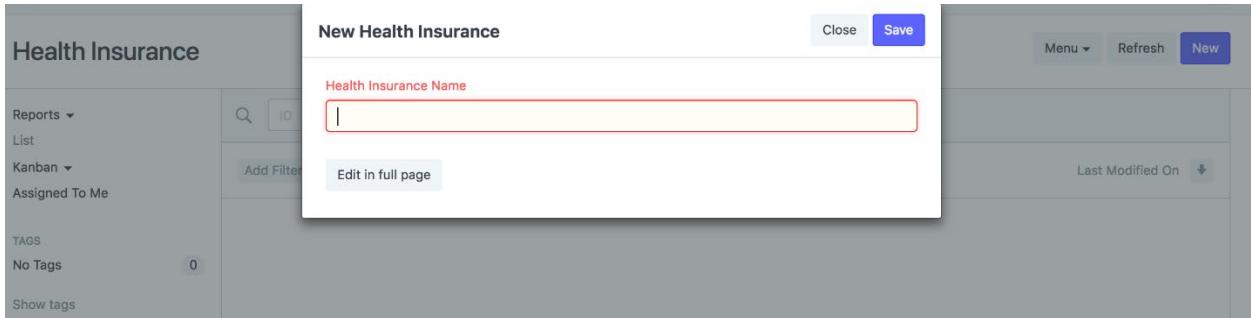
You can also choose to customize the *Message* you send to users.

Note:

1. If no holiday list is selected then the email will be sent every day.
2. Name of a "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. via HR module or search bar and set the users for whom you want to send the reminder.

8. Employee Health Insurance

To create Health Insurance Provider: Human Resources > Health Insurance > New



In Employee, you can attach the provider and fill in the Health Insurance No.

9. Staffing Plan

Staffing Plan helps you to plan human resource recruitments for your Company. ERP+ allows you to do this at a group company level helping you efficiently plan and budget new hiring for a period. Job Openings can only be created as per the number of vacancies and budget as per the active Staffing Plan. Human Resources > Setup > Staffing Plan > New Staffing Plan

Plan 2019-1 Submitted Menu Cancel

Comments 0

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TAGS
Add a tag ...

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You created this a few seconds ago

Company: **Awesome Co** From Date: **01-04-2018**

Department: **All Departments** To Date: **31-03-2019**

STAFFING PLAN DETAILS

<input type="checkbox"/>	Designation	Number Of Positions	Current Count	Vacancies	
<input type="checkbox"/>	1 Designer	5	3	2	▼
<input type="checkbox"/>	2 Software Developer	50	18	32	▼
<input type="checkbox"/>	3 Project Manager	3	2	1	▼
<input type="checkbox"/>	4 HR Manager	0	1	0	▼
<input type="checkbox"/>	5 Researcher	5	3	2	▼
<input type="checkbox"/>	6 Business Development Manager	3	1	2	▼

Total Estimated Budget: **₹ 10,25,000.00**

- **Designation:** The designations for which you are creating the Staffing Plan.
- **Number of Positions:** The number of positions you plan to recruit for between the Staffing Plan from and to dates.
- **Current Count:** This is the number of Employees already hired for the Designation.
- **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.

Editing Row #5

Designation: **Researcher**

Number Of Positions: **5**

Estimated Cost Per Position: **₹ 32,000.00**

Total Estimated Cost: **₹ 64,000.00**

Current Count: **3**

Vacancies: **2**

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.

10. HR Settings

Global settings for HR related documents

HR Settings

Menu Save

Comments 0

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TAGS

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13 days ago

Employee Settings

Employee Records to be created by

Naming Series

Employee record is created using selected field.

Stop Birthday Reminders
Don't send Employee Birthday Reminders

Payroll Settings

Include holidays in Total no. of Working Days
If checked, Total no. of Working Days will include holidays, and this will reduce the value of Salary Per Day

1.2 Topic: **Recruitment**

1. Staffing Plan
2. Job Applicant
3. Job Offer
4. Job Opening

1. Staffing Plan

Staffing Plan helps you to plan human resource recruitments for your Company. ERP+ allows you to do this at a group company level helping you efficiently plan and budget new hiring for a period. Job Openings can only be created as per the number of vacancies and budget as per the active Staffing Plan. Human Resources > Setup > Staffing Plan > New Staffing Plan

Plan 2019-1 Submitted Menu Cancel

Comments 0

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TAGS
Add a tag ...

SHARED WITH
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You edited this a few seconds ago

You created this a few seconds ago

Company: **Awesome Co** From Date: **01-04-2018**

Department: **All Departments** To Date: **31-03-2019**

STAFFING PLAN DETAILS

<input type="checkbox"/>	Designation	Number Of Positions	Current Count	Vacancies	
<input type="checkbox"/>	1 Designer	5	3	2	▼
<input type="checkbox"/>	2 Software Developer	50	18	32	▼
<input type="checkbox"/>	3 Project Manager	3	2	1	▼
<input type="checkbox"/>	4 HR Manager	0	1	0	▼
<input type="checkbox"/>	5 Researcher	5	3	2	▼
<input type="checkbox"/>	6 Business Development Manager	3	1	2	▼

Total Estimated Budget
₹ 10,25,000.00

- **Designation:** The designations for which you are creating the Staffing Plan.
- **Number of Positions:** The number of positions you plan to recruit for between the Staffing Plan from and to dates.
- **Current Count:** This is the number of Employees already hired for the Designation.
- **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.

Editing Row #5

Designation

Researcher

Current Count

3

Number Of Positions

5

Vacancies

2

Estimated Cost Per Position

₹ 32,000.00

Total Estimated Cost

₹ 64,000.00

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.

2. Job Applicant

You can maintain a list of People who have applied for a Job Opening.

To create a new Job Applicant, go to: Human Resource > Recruitment > Job Applicant > New Job Applicant

applicant - app@gmail.com ● Open Menu - Save

Comments 0

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Attach File +

TAGS
Add a tag...

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Applicant Name: applicant

Job Opening: Software Engineer

Email Id: app@gmail.com

Status: Open

View Offer Letter

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 system shall create a New Job Applicant against each email received on the mailbox.

- To link Email Account with Job Applicant, go to: Setup > Email > Email Account > New Email Account
- Enter the Email Address and the password, and select 'Enable Incoming'
- In 'Append To' select 'Job Applicant'

Jobs ● Not Saved Menu - Save

Add a tag...

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You edited this 14 days ago

You created this 14 days ago

Enable Incoming
Check this to pull emails from your mailbox

POP3 Server
e.g. pop.gmail.com

Use SSL

Attachment Limit (MB)
1

Ignore attachments over this size

Append To
Job Applicant
Append as communication against this DocType (must have fields, "Status", "Subject")

Default Incoming
e.g. replies@yourcompany.com. All replies will come to this inbox.

Job Offer

Job Offer is given to selected candidates after Interview & selection which states the offered salary package, designation, grade, department working, no of days entitled for leave.

In ERP+ you can make a record of the Job Offers that you can give to candidates. To create a new Job Offer, go to: Human Resource > Recruitment > Job Offer > New

New Job Offer 1 ● Not Saved Save

<p>Job Applicant</p> <p>Jack Sparrow</p> <p>Applicant Name</p> <p>Jack Sparrow</p>	<p>Status</p> <p>Awaiting Response</p> <p>Offer Date</p> <p>02-01-2018</p> <p>Designation</p> <p>Captain</p> <p>Company</p> <p>Wind Power LLC</p>
--	---

	Offer Term	Value / Description	
<input type="checkbox"/>	1	Annual Salary	5,00,000/-
Add Row			

Select Terms and Conditions

Note: A Job Offer can be made only against a Job Applicant
 There is a pre-designed print format to print you Job Offer.

Jack Sparrow ● Draft Offer-00001 📄 Menu Submit

Dear Jack Sparrow,

We are pleased to appoint you in the services of Wind Power LLC on the terms and conditions detailed in this letter.

Your designation shall be Captain.
 Salary: 35,000/-

Please read the detailed terms as below. If you have any queries, feel free to get in touch with us. We look forward to your long and fruitful career association with our organisation. If you decide to join us, 'Welcome to Wind Power LLC !'

Yours truly,

Authorized Signatory
 Wind Power LLC

Annexure 1: Compensation and Responsibilities:

A. Compensation:
 Your Salary will be Rs 25,000 per month (CTC).

B. Job Description and Responsibilities:
 Software Development

Annexure 2: Company Policies

A. Work Culture:
 We believe in a "Result Oriented Work Culture" at Web Notes. What that means is, you will primarily be judged on how well you perform your role.
 Working hours are flexible and you can also work from home. We normally work Mondays to Fridays, 10am to 6pm.
 You are encouraged to take initiatives and bring in new thoughts and ideas that in any way will improve the way we work.

B. Leaves:

3. Job Opening

You can make a record of the open vacancies in your company using Job Opening.

To create a new Job Opening go to: Human Resource > Recruitment > Job Opening > New Job Opening

senior-developer • Open
Menu ▼ Save

See on Website

Comments 0

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TAGS
Add a tag ...

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You edited this
a few seconds ago

You created this
3 minutes ago

Job Title

Designation

Company

Department

Status

Staffing Plan

Planned number of Positions

Publish on website

Description

Responsibilities

- Producing clean, efficient code based on specifications
- Actively participate and contribute to open source communities

Requirements

- Operating System: Linux
- Languages: Python, Javascript
- Version control: Git

Education

Bachelors or higher (with IT)

ERP+ 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 its parent group companies in the hierarchy.

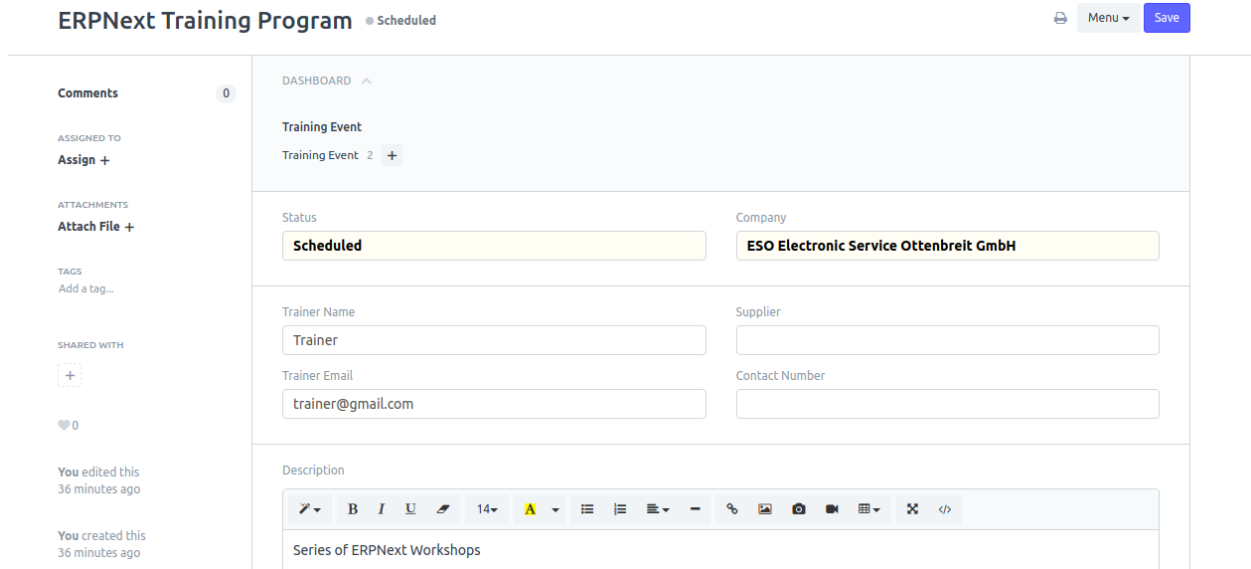
1.3 Topic: Employee Management

1. Training
2. Daily Work Summary
3. Shift Management
4. Employee Lifecycle

1. Training

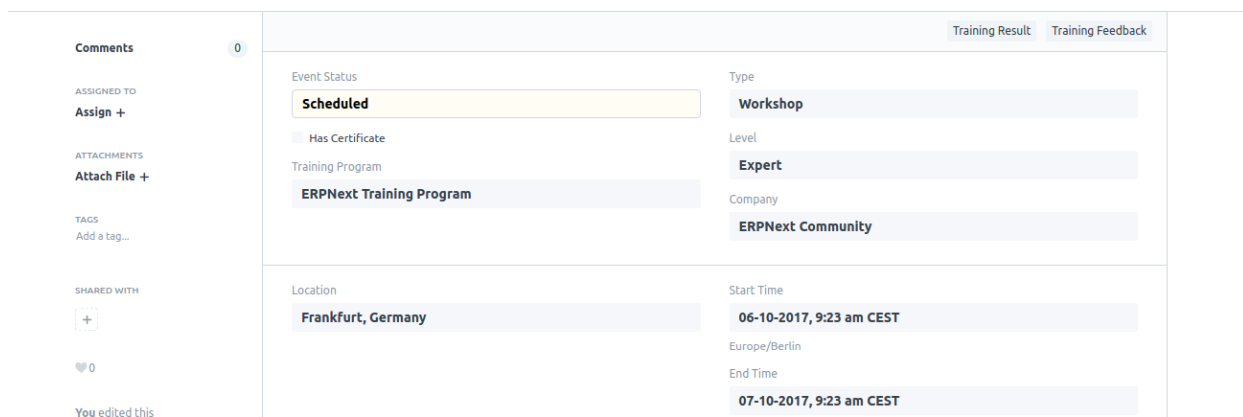
Training Program

Create Training Program and schedule Training Events under it. It has a dashboard linked to Training Event to view which event is under the Training Program.



Training Event

Schedule seminars, workshops, conferences etc. using Training Event linked to a Training Program. You can also invite your employees to attend the event using this feature.



Inviting Employees for Event

You can invite your employees to attend the event. You can do so by selecting the employees to be invited in the employee table.

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

You edited this a few seconds ago

You created this a minute ago

	Employee	Status	
1	EMP/0010: Charmaine Gaudreau	Confirmed	▼
2	EMP/0009: Vakhita Ryzhev	Confirmed	▼
3	EMP/0008: Gabrielle Loftus	Invited	▼
4	EMP/0007: Michal Sobczak	Confirmed	▼
5	EMP/0006: Tilde Lindqvist	Confirmed	▼
6	EMP/0004: Nuran Verkleij	Invited	▼
Add new row			

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.

Training Result

After completion of the training Employee-wise training results can be stored based on the Feedback received from the Trainer.

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag...

SHARED WITH

0

	Employee	Hours	Grade	Comments	
1	EMP/0010: Charmaine Gaudreau	6	B	Was good.	▼
2	EMP/0009: Vakhita Ryzhev	6	A	Awsome developer	▼
3	EMP/0008: Gabrielle Loftus	6	B	Needs to work on Testing	▼
4	EMP/0007: Michal Sobczak	4	NA	Left early	▼
5	EMP/0006: Tilde Lindqvist	0	NA	Did not attend.	▼
6	EMP/0004: Nuran Verkleij	6	C	Needs to practice more	▼

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.

Training Feedback

Employees can then share their feedback via Training Feedback.

Charmaine Gaudreau • Submitted

Feedback0001 Menu - Cancel

<p>Comments 0</p> <p>ASSIGNED TO</p> <p>Assign +</p> <p>ATTACHMENTS</p> <p>Attach File +</p> <p>TAGS</p>	<p>Employee</p> <p>EMP/0010: Charmaine Gaudreau</p> <p>Employee Name</p> <p>Charmaine Gaudreau</p>	<p>Training Event</p> <p>ERPNext Developer Workshop</p> <p>Event Name</p> <p>ERPNext Developer Workshop</p>
	<p>Feedback</p> <p>Was a really nice workshop. Would like to attend more such workshops in the future.</p>	

2. Daily Work Summary

Daily Work Summary is way to get a automated way to get a summary of work done by users.

Replies of all users who choose to respond is collected and sent as a summary at midnight. Emails are only sent based on the Holiday List selected for the group

Note:

You must have one active incoming email account setup for this to work.

How to Use

Go to "Daily Work Summary Group" via HR module or search bar and set the users for whom you want to send the reminder.

You can set multiple groups with different set of *users* from your user list with different time to send emails and with separate holiday list for each.

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

Note:

1. If no holiday list is selected then the email will be sent every day.
2. Name of a "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.

3. Shift Management

Shift Management section of Human Resources helps your Organization manage shifts of your employees.

To use Shift Management in ERP+:

1. Set Up a Shift Type.
2. Enter Shift Request.
3. View and Manage Shift Assignments.

Shift Type

The Shift Type Set Up allows you to define the different types of Shifts in your Organization.

To create a new Shift Type, go to: Human Resources > Shift Management > Shift Type

- Enter Shift Type, Start Time and End Time for quick entry.

New Shift Type

Close Save

Shift Type Name

Start Time

End Time

Edit in full page

Shift Request

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

To create a new Shift Request Log, go to: Human Resources > Shift Management > Shift Request

- Enter Shift Type, Employee, Company, From Date and To Date.

Shift Type Day Shift	Company MahaOnline Ltd
Employee EMP/00001	From Date 01-08-2018
Employee Name Pawan Mehta	To Date 31-08-2018

Shift Assignment

- Once the Shift Request is submitted it automatically creates the Shift Assignments for an Employee.

Shift Assignment

Menu Refresh New

Reports ▾ List Gantt Calendar Kanban ▾ Assigned To Me SAVE FILTER Filter Name TAGS No Tags 83 Show tags	ID <input type="text"/> <input type="button" value="Q"/> Restricted																																															
	Add Filter Last Modified On ↑																																															
	<table border="1"> <thead> <tr> <th><input type="checkbox"/> <input type="heart"/></th> <th>Employee Name</th> <th>Status</th> <th>Shift Type</th> <th>Date</th> <th></th> <th>20 of 83</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> <input type="heart"/></td> <td>Pawan Mehta</td> <td>Submitted</td> <td>Day Shift</td> <td>31-08-2018</td> <td>SH00115 1 m</td> <td><input type="checkbox"/> 0</td> </tr> <tr> <td><input type="checkbox"/> <input type="heart"/></td> <td>Pawan Mehta</td> <td>Submitted</td> <td>Day Shift</td> <td>30-08-2018</td> <td>SH00114 1 m</td> <td><input type="checkbox"/> 0</td> </tr> <tr> <td><input type="checkbox"/> <input type="heart"/></td> <td>Pawan Mehta</td> <td>Submitted</td> <td>Day Shift</td> <td>29-08-2018</td> <td>SH00113 1 m</td> <td><input type="checkbox"/> 0</td> </tr> <tr> <td><input type="checkbox"/> <input type="heart"/></td> <td>Pawan Mehta</td> <td>Submitted</td> <td>Day Shift</td> <td>28-08-2018</td> <td>SH00112 1 m</td> <td><input type="checkbox"/> 0</td> </tr> <tr> <td><input type="checkbox"/> <input type="heart"/></td> <td>Pawan Mehta</td> <td>Submitted</td> <td>Day Shift</td> <td>27-08-2018</td> <td>SH00111 1 m</td> <td><input type="checkbox"/> 0</td> </tr> </tbody> </table>						<input type="checkbox"/> <input type="heart"/>	Employee Name	Status	Shift Type	Date		20 of 83	<input type="checkbox"/> <input type="heart"/>	Pawan Mehta	Submitted	Day Shift	31-08-2018	SH00115 1 m	<input type="checkbox"/> 0	<input type="checkbox"/> <input type="heart"/>	Pawan Mehta	Submitted	Day Shift	30-08-2018	SH00114 1 m	<input type="checkbox"/> 0	<input type="checkbox"/> <input type="heart"/>	Pawan Mehta	Submitted	Day Shift	29-08-2018	SH00113 1 m	<input type="checkbox"/> 0	<input type="checkbox"/> <input type="heart"/>	Pawan Mehta	Submitted	Day Shift	28-08-2018	SH00112 1 m	<input type="checkbox"/> 0	<input type="checkbox"/> <input type="heart"/>	Pawan Mehta	Submitted	Day Shift	27-08-2018	SH00111 1 m	<input type="checkbox"/> 0
	<input type="checkbox"/> <input type="heart"/>	Employee Name	Status	Shift Type	Date		20 of 83																																									
	<input type="checkbox"/> <input type="heart"/>	Pawan Mehta	Submitted	Day Shift	31-08-2018	SH00115 1 m	<input type="checkbox"/> 0																																									
	<input type="checkbox"/> <input type="heart"/>	Pawan Mehta	Submitted	Day Shift	30-08-2018	SH00114 1 m	<input type="checkbox"/> 0																																									
	<input type="checkbox"/> <input type="heart"/>	Pawan Mehta	Submitted	Day Shift	29-08-2018	SH00113 1 m	<input type="checkbox"/> 0																																									
	<input type="checkbox"/> <input type="heart"/>	Pawan Mehta	Submitted	Day Shift	28-08-2018	SH00112 1 m	<input type="checkbox"/> 0																																									
	<input type="checkbox"/> <input type="heart"/>	Pawan Mehta	Submitted	Day Shift	27-08-2018	SH00111 1 m	<input type="checkbox"/> 0																																									

- You can also view Calendar view of Shift Assignments.

< > today		June 2018					month
SUN	MON	TUE	WED	THU	FRI	SAT	
27	28	29	30	31	1	2 Pawan Mehta	
3	4 Pawan Mehta	5 Pawan Mehta	6 Pawan Mehta	7 Pawan Mehta	8 Pawan Mehta	9 Pawan Mehta	
10	11 Pawan Mehta	12 Pawan Mehta	13 Pawan Mehta	14 Pawan Mehta	15 Pawan Mehta	16 Pawan Mehta	
17	18 Pawan Mehta	19 Pawan Mehta	20 Pawan Mehta	21 Pawan Mehta	22 Pawan Mehta	23 Pawan Mehta	

4. 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 enterprise HR departments to keep records of these changes, employees go through across the company. ERP+ simplifies these HR activities, read the following sections to understand how.

Topics

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

1.4 Topic: Leave Management

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

1. Leaves and Holiday

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

Employees create leave requests, which their respective managers (leave approver) can approve or reject. An Employee can select from a number of leave types such as sick leave, casual leave, privilege leave and so on. The number and type of leaves an Employee can apply is controlled by Leave Allocations. You can create Leave Allocations 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.

2. Leave Type

Human Resources > Leaves and Holiday > Leave Type > New Leave Type

Leave Type refers to types of leave allotted to an employee by a company. An employee can select a particular Leave Type while requesting for a leave. You can create any number of Leave Types based on your company's requirement.

- **Max Leaves Allowed:** This field allows you to set the maximum number of leaves of this Leave Type that Employees can apply within a Leave Period.
- **Applicable After (Working Days):** Employees who have worked with the company for this number of days are only allowed to apply for this Leave Type. Do note that any other leaves availed by the Employee after her joining date is also considered while calculating working days.
- **Maximum Continuous Days Applicable:** It refers to maximum number of days this particular Leave Type can be availed at a stretch. If an employee exceeds the maximum number of days under a particular Leave Type, his/her extended leave may be considered as 'Leave Without Pay' and this may affect his/her salary calculation.
- **Is Carry Forward:** If checked, the balance leave will be carried forwarded 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.
- **Allow Negative Balance:** If checked, system will always allow to approve leave application for the Leave Type, even if there is no leave balance.
- **Include holidays within leaves as leaves:** Check this option if you wish to count holidays within leaves as a 'leave'. 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 a cashable leave. You can check this option to mark the Leave Type as compensatory. An Employee can request for compensatory leaves using Compensatory Leave Request and on approval of such requests, Leave Allocation for this leave type is updated allowing her to apply for leaves of this type later on.

- **Is Optional:** Check this Optional Leaves are holidays which 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 granted to an Employee in a Leave Period by setting the Max Days Leave Allowed field.
- **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 cashable, so you should set "Allow Encashment" for Leave Types which are cashable. Leave encashment is allowed only in the last month of the Leave Period.

ENCASHMENT ^

Allow Encashment

Encashment Threshold Days

Earning Component

You can set the *Encashment Threshold Days* field so that the Employees won't be able to cash that many days. These days should be carry forwarded to the next Leave Period so that it can be either cashed or availed. You may also want to set the *Earning Component* for use in Salary Slip while paying out the cashed amount to Employees as part of their Salary.

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

- **Earned Leave:** Earned Leaves are leaves earned by an employee after working with the company for a certain amount of time. Checking "Is Earned Leave" will allot leaves pro rata by automatically updating Leave Allocation for leaves of this type at intervals set by Earned Leave Frequency. For example, if an employee earns 2 leaves of type Paid Leaves monthly, ERP+ automatically increments the Leave Allocation for Paid Leave at the end of every month by 2. 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.

EARNED LEAVE ^

Is Earned Leave

Earned Leave Frequency

Rounding

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 purpose or unavoidable personal reason. Employee does not get paid for such leaves.
- **Privilege leave:** These are like earned leaves which can be availed for the purpose of travel, family vacation and so on.
- **Sick leave:** You can avail these leaves if you are unwell.
- **Compensatory off:** These are compensatory leave allotted to employees for overtime work.
- **Casual leave:** You can avail this leave to take care of urgent and unseen matters.

3. Leave Period

Most companies manage leaves based on a Leave Period, corresponding to a calendar year or the fiscal year. ERP+ allows you to create a Leave period by going to: Human Resources > Leaves and Holiday > Leave Period > New Leave Period

The screenshot shows a web form for creating a new leave period for the year 2018. The form is titled '2018' and has a 'Save' button in the top right corner. On the left side, there are three sections: 'Comments' with a '0' notification, 'ASSIGNED TO' with an 'Assign +' button, and 'ATTACHMENTS' with an 'Attach File +' button. The main form area contains the following fields: 'From Date' with the value '01-01-2018', 'To Date' with the value '31-12-2018', 'Company' with the value 'Awesome Co', and a checked 'Is Active' checkbox. At the bottom of the form, there is a 'GRANT LEAVES' button with a dropdown arrow.

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

Granting Leaves to Employees

Leave Management in ERP+ is based on Leave Allocations created for each employee. This means, Employees can only avail as many leaves (of each Leave Type) allocated to them.

You can configure Leave Policies and apply the Leave Policy for different Employee Grades or to specific Employees. The Grant button will allow you to create leave allocations in bulk. Alternatively, you can also create Leave Allocations manually.

4. Leave Policy

Human Resources > Leaves and Holiday > Leave Policy > New Leave Policy

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

Leave-Policy-0001 Submitted Menu Cancel

<input type="checkbox"/>	Leave Type	Annual Allocation	
<input type="checkbox"/>	1 Privilege Leave	10	▼
<input type="checkbox"/>	2 Casual Leave	24	▼
<input type="checkbox"/>	3 Leave Without Pay	30	▼
<input type="checkbox"/>	4 Compensatory Off	10	▼
<input type="checkbox"/>	5 Sick Leave	10	▼

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

SHARED WITH

Enforcing the Leave Policy

To enforce the Leave Policy, you can either:

- Apply the Leave Policy in Employee Grade

GS-9 Menu Save

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

Default Leave Policy
Leave-Policy-0001

Default Salary Structure
Senior Executives

This will ensure all leave allocations for all employees of this grade will be as per the Leave Policy

- Update Employee record with appropriate Leave Policy. In case you need to selectively update the Leave Policy for a particular Employee, you can do so by updating the Employee record.

ORGANIZATION PROFILE

Reports to
EMP/00001

Leave Policy
Leave-Policy-0001-1

5. Leave Allocation

Leave Allocation enables you to allot a specific number of leaves to a particular employee. You can allocate a number of leaves to different types of leave.

Allocating leaves for a Leave Period

Human Resources > Leaves and Holiday > Leave Period

Leave Period helps you manage leaves for a period and also doubles up 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. Also, note that Carry Forward Leaves check will enable you to carry forward any unused leaves (for Leave Types with Is Carry Forward turned on) from previous allocations to new ones.

2018
Menu ▼
Save

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

SHARED WITH
+

♥

You edited this
a few seconds ago

You created this
4 days ago

From Date

To Date

Company

Is Active

GRANT LEAVES ^

Filter By

Employee Grade

Department

Designation

Employee

Carry Forward Leaves

Manual Allocation of leaves

Human Resources > Leaves and Holiday > Leave Allocation > New Leave Allocation

To manually allocate leaves for an Employee, select the period and the number of leaves you want to allocate. You can also add unused leaves from previous allocation period.

LAL/00008 ● Draft

  Menu Submit

Comments 0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag...

SHARED WITH



You edited this
a few seconds ago

Employee

EMP/0001 

Employee Name

Nabin

Description

Leave Type

Casual Leave

From Date

01-01-2016

To Date

31-12-2016

New Leaves Allocated

15.000

Add unused leaves from previous allocations

Unused leaves

6.500

Total Leaves Allocated

21.500

6. Leave Application

If your company has a formal system where Employees have to apply for leaves to be able to qualify as paid leaves, you can create Leave Application to track approval and usage of leaves. The applying employee requires to select their Employee record, Leave Type and the period for which the leave is taken.

Human Resources > Leaves and Holiday > Leave Application > New Leave Application

New Leave Application 1 ● Not Saved

Save

Status	Open	Leave Type	Privilege Leave
From Date	11-02-2016	Reason	Travelling to my native place
To Date	13-02-2016		
<input type="checkbox"/> Half Day			
Total Leave Days	3		
Employee	EMP/0001	Leave Approver	rushabh@erpnext.com
Employee Name	Nabin Hait	Leave Approver Name	Rushabh
Posting Date	01-01-2016	Company	Test Company
<input checked="" type="checkbox"/> Follow via Email		Letter Head	test

Basic Workflow:

- Employee applies for leave through Leave Application
- Approver gets notification via email, "Follow via Email" should be checked for this.
- Approver reviews Leave Application
- Approver approves/rejects Leave Application
- Employee gets notification on the status of his/her Leave Application

New Leave Application 1 ● Not Saved

Save

<p>Status</p> <input type="text" value="Open"/>	<p>Leave Type</p> <input type="text" value="Privilege Leave"/>
<p>From Date</p> <input type="text" value="11-02-2016"/>	<p>Reason</p> <input type="text" value="Travelling to my native place"/>
<p>To Date</p> <input type="text" value="13-02-2016"/>	
<p><input type="checkbox"/> Half Day</p> <p>Total Leave Days</p> <p>3</p>	
<p>Employee</p> <input type="text" value="EMP/0001"/>	<p>Leave Approver</p> <input type="text" value="rushabh@erpnext.com"/>
<p>Employee Name</p> <p>Nabin Hait</p>	<p>Leave Approver Name</p> <p>Rushabh</p>
<p>Posting Date</p> <input type="text" value="01-01-2016"/>	<p>Company</p> <input type="text" value="Test Company"/>
<p><input checked="" type="checkbox"/> Follow via Email</p>	<p>Letter Head</p> <input type="text" value="test"/>

Setting Leave Approver

- A leave approver is a user who can approve a leave application for an employee. Leave Approvers for each department can be configured in the Department master.

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.

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

7. Compensatory Leave Request

ERP+ allows employees to request for compensatory leaves for days which they have worked on holidays. It is necessary that the dates should be in default Holiday List and also that the Employee should have her attendance marked Present. Note that Leave Types which are marked as *Is Compensatory* can be selected in the Compensatory Leave Request.

To create a new Compensatory Leave Request, go to: Human Resources > Leaves and Holiday > Compensatory Leave Request > New Compensatory Leave Request

The screenshot shows a web form for creating a new Compensatory Leave Request. The form is titled "John" and is in "Draft" status. In the top right corner, there is a document icon, the ID "CLR-0001", a "Menu" dropdown, and a blue "Submit" button. On the left side, there are sections for "Comments" (0), "ASSIGNED TO" (Assign +), "ATTACHMENTS" (Attach File +), "TAGS" (Add a tag ...), and "SHARED WITH" (+). The main form area has a heading "Submit this document to confirm" and contains the following fields:

- Employee: EMP/00036
- Employee Name: John
- Work From Date: 17-06-2018
- Work End Date: 17-06-2018
- Leave Type: Compensatory Off
- Reason: Customer working on Sunday, requested support

On submitting a Compensatory Leave Request, ERP+ updates the Leave Allocation record for the leave type is updated allowing her to apply for leaves of this type later on.

8. Leave Encashment

For Leave Types which are cashable, you can submit Leave Encashment. To create a new Leave Encashment, go to: Human Resources > Leaves and Holiday > Leave Encashment > New Leave Encashment

As you select Employee and Leave Type, Leave Balance and cashable Days (which is total leave balance less 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.

Leave-Encashment-0002 ● Draft
Menu ▼ Submit

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

SHARED WITH
+

♥

You edited this
a few seconds ago

You created this
a few seconds ago

<p>Leave Period <input style="width: 90%; border: 1px solid #ccc;" type="text" value="2018-19"/></p> <p>Employee <input style="width: 90%; border: 1px solid #ccc;" type="text" value="EMP/00001"/></p> <p>Employee Name <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Hatsue Kashiwagi"/></p> <p>Leave Type <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Privilege Leave"/></p>	<p>Leave Allocation <input style="width: 90%; border: 1px solid #ccc;" type="text" value="LAL/00012"/></p> <p>Leave Balance <input style="width: 90%; border: 1px solid #ccc;" type="text" value="12"/></p> <p>Encashable days <input style="width: 90%; border: 1px solid #ccc;" type="text" value="7"/></p>
<p>PAYROLL</p> <p>Encashment Amount <input style="width: 90%; border: 1px solid #ccc;" type="text" value="₹ 14,000.00"/></p> <p>Encashment Date <input style="width: 90%; border: 1px solid #ccc;" type="text" value="29-06-2018"/></p>	

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

9. Holiday List

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

Most organizations have a standard Holiday-List for their employees. Some even have different holiday lists based on the different locations or departments.

To add a new Holiday List, go to: Human Resources (HR) > Leave and Holiday > Holiday List

Click on New to add new Holiday List.

New Holiday List

Give a name to Holiday List. It can be based in Fiscal Year or location or department as application. Also select From and To Date for the Holiday List.

New Holiday List 1 ● Not Saved Save

Holiday List Name

From Date

To Date

You can quickly add Weekly Off in the Holiday List.

After that, you can also add specific days (like festival holidays) manually.

2017 USA ● Not Saved Menu Save

<input type="checkbox"/>	103	16-12-2017	Saturday	▼
<input type="checkbox"/>	104	23-12-2017	Saturday	▼
<input type="checkbox"/>	105	30-12-2017	Saturday	▼
<input type="checkbox"/>	106	26-06-2017	Eid	▼
<input type="checkbox"/>	107	22-09-2017	Diwali	▼
<input type="checkbox"/>	108	25-12-2017	Christmas	▼
Add new row				

Holiday List in Employee

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

Katie Basinger ● Active EMP/0002 Menu Save

Status <input type="text" value="Active"/>	Offer Date <input type="text" value="01-06-2015"/>
Employment Type <input type="text" value="Full-time"/>	Confirmation Date <input type="text" value="01-08-2015"/>
Holiday List <input type="text" value="2017 USA"/> → <small>Applicable Holiday List</small>	Contract End Date <input type="text"/>
	Date Of Retirement <input type="text" value="01-12-2050"/>

When an Employee applies for the Leave, then days mentioned in the Holiday List will not be counted, as they are holiday already. For more configuration option in Holiday List, check HR > HR Settings.

Note 1: If you have specified a Holiday List in the Employment master, then that Holiday List will give priority the default Holiday List of the company.

Note 2: 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 lists by attaching their respective holiday list to their respective employment detail form.

10. Leave Block List

Human Resources > Leaves and Holiday > Leave Block List > New Leave Block List

Leave Block List is a list of dates in a year, on which employees can not apply for leave. You can define a list of users who can approve Leave Application on blocked days, in case of urgency. You can also define whether the list will be applied to the entire company or any specific departments.

Block List 15-16 ● Not Saved

Menu ▾
Save

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag...

SHARED WITH
+

You edited this a few seconds ago

You created this a few seconds ago

Year

Company

Applies to Company
If not checked, the list will have to be added to each Department where it has to be applied.

Block Days
Stop users from making Leave Applications on following days.

	Block Date	Reason
1	01-04-2015	Year Closing Activity
2	16-07-2015	Official
Add new row		

Allow Users
Allow the following users to approve Leave Applications for block days.

	Allow User
1	rushabh@erpnext.com

1.5 Topic: **Attendance**

1. Attendance
2. Attendance Request
3. Upload Attendance
4. Employee Attendance Tool

1. Attendance

An Attendance record stating that an Employee has been present on a particular day can be created manually by: Human Resources > Documents > Attendance > New Attendance

John Smith ● Present
ATT-00007 🔄 ★ Menu ▾ Cancel

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag...

Employee	Attendance Date
EMP/0018	05-01-2015
Employee Name	Fiscal Year
John Smith	2015
Status	Company
Present	Wind Power LLC

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 Tool

2. Attendance Request

Using the Attendance Request document, employees can now submit their attendance request for the days when their attendance wasn't marked.

Just go to: Human Resources > Employee and Attendance > Attendance Request > New Attendance Request

New Attendance Request 1 ● Not Saved Save

<p>Employee EMP-0002 →</p> <p>Employee Name test_employee_2@salary.com</p> <p>From Date 06-20-2018</p> <p>To Date 06-21-2018</p> <p><input type="checkbox"/> Half Day</p>	<p>Explanation Unable to commute.</p> <p>Reason Work From Home</p> <p>Company Wind Power LLC</p>
---	--

- Fill up the details, mention the dates for which you want the attendance to be marked, reason and explanation.
- You can also choose if it has to be marked as a half day or not.
- Save it.
- On submission of the same, Attendance documents will be created for the days you mentioned.

Attendance Menu ▾ Refresh New

<p>Reports ▾</p> <p>List</p> <p>Gantt</p> <p>Calendar</p> <p>Kanban ▾</p> <p>Assigned To Me</p> <p>SAVE FILTER</p>	<p>ID <input type="text"/> Employee <input type="text"/> Leave Type <input type="text"/></p> <p>Add Filter Last Modified On ↑</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th><input type="checkbox"/> Employee Name</th> <th>Status</th> <th>Attendance Date</th> <th colspan="2">2 of 2</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> test_employee_2@salary.com</td> <td style="color: green;">● Present</td> <td>06-21-2018</td> <td>ATT-00002</td> <td>now <input type="checkbox"/> 0</td> </tr> <tr> <td><input type="checkbox"/> test_employee_2@salary.com</td> <td style="color: green;">● Present</td> <td>06-20-2018</td> <td>ATT-00001</td> <td>now <input type="checkbox"/> 0</td> </tr> </tbody> </table>	<input type="checkbox"/> Employee Name	Status	Attendance Date	2 of 2		<input type="checkbox"/> test_employee_2@salary.com	● Present	06-21-2018	ATT-00002	now <input type="checkbox"/> 0	<input type="checkbox"/> test_employee_2@salary.com	● Present	06-20-2018	ATT-00001	now <input type="checkbox"/> 0
<input type="checkbox"/> Employee Name	Status	Attendance Date	2 of 2													
<input type="checkbox"/> test_employee_2@salary.com	● Present	06-21-2018	ATT-00002	now <input type="checkbox"/> 0												
<input type="checkbox"/> test_employee_2@salary.com	● Present	06-20-2018	ATT-00001	now <input type="checkbox"/> 0												

You can see in the below image; Attendance records are linked with Attendance Request which was submitted.

test_employee_2@salary.com ● Present ATT-00001 Menu ▾ Cancel

<p>Comments 0</p> <p>ASSIGNED TO</p> <p>Assign +</p> <p>ATTACHMENTS</p> <p>Attach File +</p>	<p>Employee EMP-0002: test_employee_2@salary.com</p> <p>Employee Name test_employee_2@salary.com</p> <p>Status Present</p>	<p>Attendance Date 06-20-2018</p> <p>Company Wind Power LLC</p> <p>Attendance Request EAR0001</p>
---	---	--

So, if you cancel the Attendance request, the linked Attendance documents created will be cancelled as well.

Attendance
Menu ▾ Refresh **New**

Reports ▾

List

Gantt

Calendar

Kanban ▾

Assigned To Me

SAVE FILTER

Filter Name

Add Filter Last Modified On ↑

	Employee Name	Status	Attendance Date	2 of 2
<input type="checkbox"/>	test_employee_2@salary.com	● Cancelled	06-20-2018	ATT-00001 now <input type="text"/> <input type="text"/> 0
<input type="checkbox"/>	test_employee_2@salary.com	● Cancelled	06-21-2018	ATT-00002 now <input type="text"/> <input type="text"/> 0

3. Upload Attendance

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

To upload the attendance, go to: Human Resources > Upload Attendance

Upload Attendance Not Saved Menu Save

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS

SHARED WITH
+

You edited this
5 days ago

Demo User created this
a month ago

Download Template

Download the Template, fill appropriate data and attach the modified file. All dates and employee combination in the selected period will come in the template, with existing attendance records

Attendance From Date

Attendance To Date

Get Template

Import Attendance

Browse or **Web Link**

Attach

4. Employee Attendance Tool

To go the attendance tool, go to: Human Resources > Employee and Attendance > Employee Attendance Tool

This tool allows you to add attendance records for multiple employees quickly.

Employee Attendance Tool

Date 02-02-2016		Branch 	
Department 		Company Wind Power LLC	
Unmarked Attendance			
<input type="checkbox"/> Check all <input type="checkbox"/> Uncheck all			
<input type="checkbox"/> Michal Sobczak	<input type="checkbox"/> Tilde Lindqvist	<input type="checkbox"/> Zukutakitoteka	
<input type="button" value="Mark Present"/> <input type="button" value="Mark Absent"/> <input type="button" value="Mark Half Day"/>			
Marked Attendance			
<input checked="" type="checkbox"/> Charmaine Gaudreau	<input checked="" type="checkbox"/> Dikman Shervashidze Shervashidze	<input checked="" type="checkbox"/> Gabrielle Loftus	<input checked="" type="checkbox"/> Hatsue Kashiwagi
<input type="checkbox"/> Nuran Verkleij	<input type="checkbox"/> Vakhita Ryzhev	<input type="checkbox"/> Дмитрий Пирогов	

1.6 Topic: Lifecycle and Salary

1. Appraisal
2. Employee Onboarding and Separation
3. Employee Promotion
4. Employee Transfer

1. Appraisal

In ERP+, you can manage Employee Appraisals by creating an Appraisal Template for each role with the parameters that define the performance by giving appropriate weightage to each parameter. Human Resource > Appraisal > New

Step 1: Select an Appraisal Template

The screenshot shows a web form titled "New Appraisal 1" with a "Not Saved" indicator and a "Save" button. The main content area is titled "Appraisal Template" and contains a text input field with a red border. Below the field is the instruction: "Select template from which you want to get the Goals".

After you select the template, the remaining form appears.

Step 2: Enter Employee Details

The screenshot shows a completed appraisal form for "Charmaine Gaudreau" with a status of "Submitted". The form includes a sidebar with "Comments" (0), "ASSIGNED TO" (Assign +), "ATTACHMENTS" (Attach File +), and "TAGS" (Add a tag...). The main form area contains the following details:

- Appraisal Template:** EMP/010
- Status:** Submitted
- Start Date:** 05-30-2014
- End Date:** 05-01-2015
- For Employee Name:** Charmaine Gaudreau

Below these details is a "Goals" table:

Goal	Weightage (%)	Score (0-5)	Score Earned
1 Build new web sites	40	4.500	1.800
2 Maintain current databases	20	4	0.800
3 Backup database from servers	15	5	0.750
4 Work as superior assignment	25	4	1

At the bottom of the goals section, it shows: "Total Score (Out of 5) 4.350".

Once the Appraisal Template is completed, you can create Appraisal records for each period where you track performance. You can give points out of 5 for each parameter and the system will calculate the overall performance of the Employee.

To make the Appraisal final, make sure to "Submit" it.

2. Employee Onboarding and Separation

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

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

Same way, you can have a different set of activities to be performed when relieving an Employee, like:

- Disable access from the system
- Collect assets from the relieving Employee, if any allocated
- Collect ID card
- Update employee master
- Perform full and final payment process in the payroll

In ERP+, these standard activities can be tracked in the Employee Onboarding and Separation Template.

Employee Onboarding Template

Researcher
EOBT00001 Menu Save

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a few seconds ago

You created this

Company

Designation

Department

Employee Grade

ACTIVITIES

<input type="checkbox"/>	Activity Name	User	Role	
<input type="checkbox"/>	1 Disable access from the system		System Manager	▼
<input type="checkbox"/>	2 Collect assets from the Employee, if any alloc...	NuranVerkleij@example.com	Stock Manager	▼
<input type="checkbox"/>	3 Collect ID card		HR User	▼
<input type="checkbox"/>	4 Update employee master	aromn@example.com	HR Manager	▼
<input type="checkbox"/>	5 Perform full and final payment process in the ...		Accounts Manager	▼

Add Row

You can notice that for each Activity, you can also mention the User or Role, or one of it, to whom this activity will be assigned.

You can also maintain separate master for the Employee Separation Template, based on Department, Designation, and Grade.

Employee Onboarding

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

You can select an applicant from Job Applicant master, and fetch activities from Employee Onboarding master.

John Matthew ● Submitted
EOB00003 Menu Cancel

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Job Applicant

John Matthew - john_matthew@email.com - research-analyst

Job Offer

Offer-00001

Employee Name

John Matthew

Date of Joining

07-01-2018

Status

Pending

Employee Onboarding Template

EOBT00001

Company

Wind Power LLC

Department

Research & Development - WPL

Designation

Researcher

Employee Grade

II

Project

Employee Onboarding : John Matthew - john_matthew@email.com - research-analyst

<input type="checkbox"/>	Activity Name	User	Role	
<input type="checkbox"/>	1 Disable access from the system		System Manager	▼
<input type="checkbox"/>	2 Collect assets from the Employee, if any alloc...	NuranVerkleij@example.com	Stock Manager	▼
<input type="checkbox"/>	3 Collect ID card		HR User	▼
<input type="checkbox"/>	4 Update employee master	aromn@example.com	HR Manager	▼
<input type="checkbox"/>	5 Perform full and final payment process in the ...		Accounts Manager	▼

Tasks and Assignments

On submission on Employee Onboarding / Separation, a Project will be created. Within the Project, a Tasks will also be created for each Activity. Again, each Task will be allocated, based on the User or Role selected for that Activity.

Employee Creation

Based on the progress on the Tasks, progress can be updated in the Employee Onboarding and Separation process.

John Matthew Submitted EOB00003 Menu Cancel

View Make

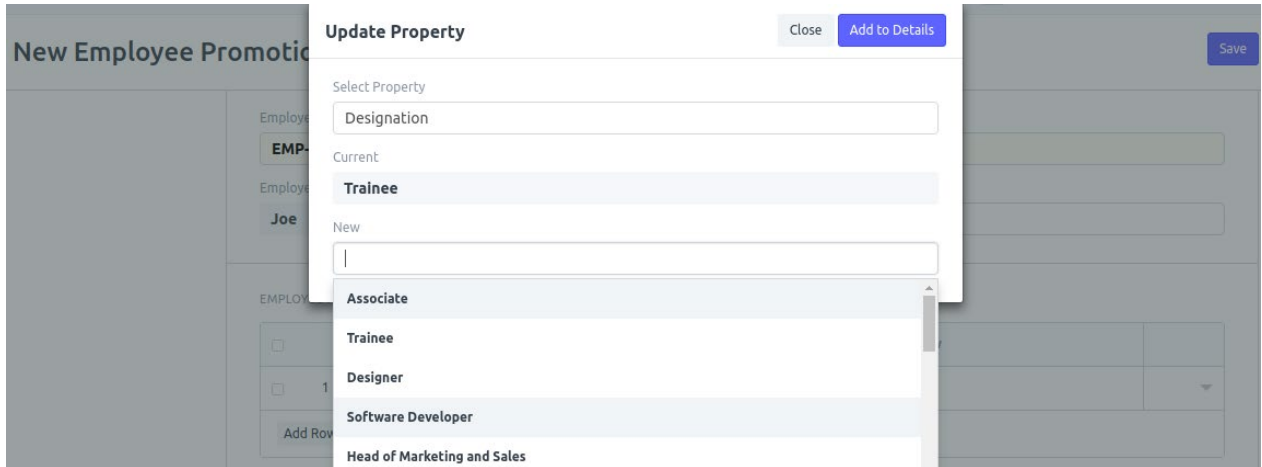
Comments 0	Job Applicant John Matthew - john_matthew@email.com - research-analyst	Employee Onboarding Template EOBT00001
ASSIGNED TO Assign +	Job Offer Offer-00001	Company Wind Power LLC
ATTACHMENTS Attach File +		

3. Employee Promotion

You can manage Employee Promotions using this document.

To record an Employee Promotion, go to: Human Resource > Employee Promotion > New Employee Promotion

Select Employee and add all details to be updated to Promotion Details table.



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. ERP+ also keeps a record of all promotions of the Employee in the Employment History table in Employee document.

Joe Submitted EP00026 Menu Cancel

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Employee		Promotion Date	
EMP-00003: Joe		01-05-2018	
Employee Name		Company	
Joe		Awesome	

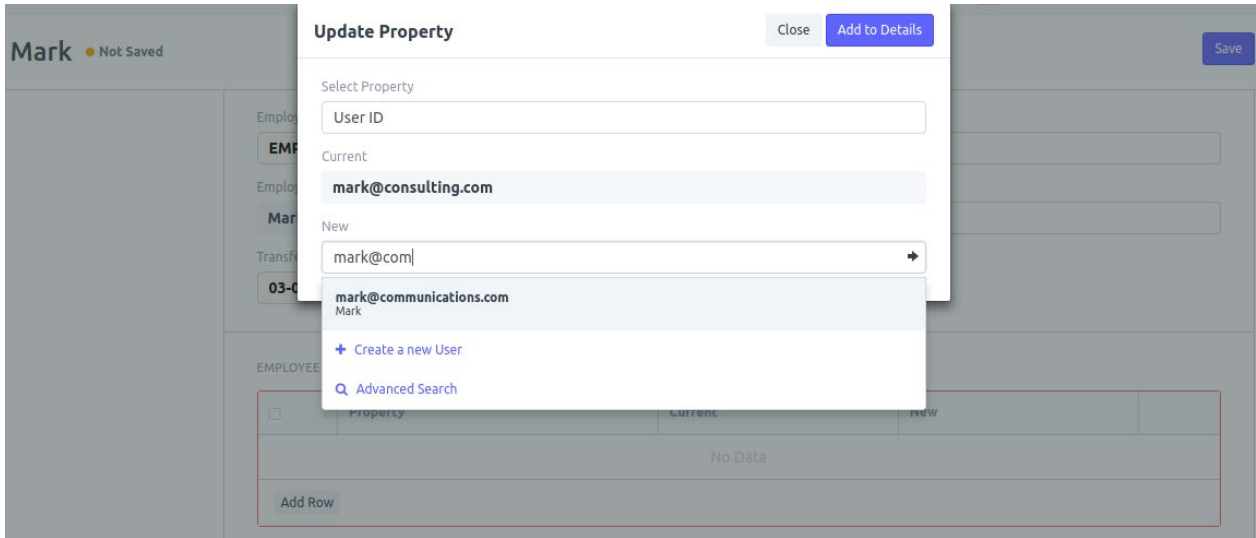
EMPLOYEE PROMOTION DETAILS				
<input type="checkbox"/>	Property	Current	New	
<input type="checkbox"/>	1 Employment Type	Intern	Full-time	▼
<input type="checkbox"/>	2 Designation	Trainee	Software Developer	▼
<input type="checkbox"/>	3 Notice (days)	15	30	▼
<input type="checkbox"/>	4 Confirmation Date		01-05-2018	▼

4. Employee Transfer

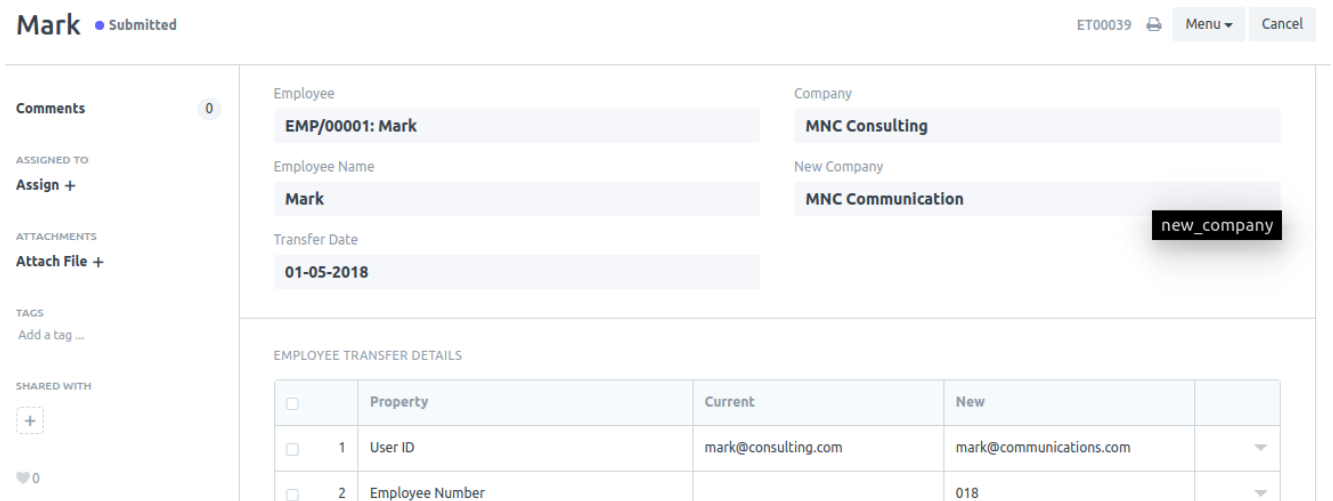
You can transfer Employees to different Company or Department by using Employee Transfer.

To record an Employee Transfer, go to: Human Resource > Employee Transfer > New Employee Transfer

Select Employee and add all details to be updated to Transfer Details table.



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

1.7 Topic: Payroll

1. Introduction
2. Payroll Entry
3. Additional Salary
4. Retention Bonus
5. Employee Benefit Application
6. Employee Benefit Claim
7. Employee Tax Exemption Declaration
8. Employee Tax Exemption Proof Submission
9. Payroll Period
10. Payroll Setup
11. Setting Up Tax

1. Introduction

Payroll processing is an important function of every enterprise HR. ERP+ 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 ERP+ Human Resources to super power your Payroll processing.

2. Payroll Entry

Payroll Entry enables bulk processing of payroll for the employees company-wide or the employees of a particular branch, department or designation. Payroll Entry helps you create Salary Slips in bulk for selected employees, submit the created Salary Slips at once, submit salary accrual entry and finally post bank entry for recording the salary payment, automating almost every step involved in payroll processing. Here's how you can use Payroll Entry to simplify your payroll processing. Human Resources > Payroll > Payroll Entry > New Payroll Entry

New Payroll Entry 1 • Not Saved

SELECT EMPLOYEES

Company Awesome Co	Branch
Posting Date 29-06-2018	Department
Payroll Frequency Monthlv	Designation

Get Employee Details

	Employee	Employee Name	Department	Designation	
<input type="checkbox"/>	1	EMP/00002: Josh	Josh		HR Manager
<input type="checkbox"/>	2	EMP/00003: John	John		Business D...
<input type="checkbox"/>	3	EMP/00001: Hatsue...	Hatsue Kashiwagi		Analyst

Salary Slip Based on Timesheet

SELECT PAYROLL PERIOD

Start Date 01-06-2018	<input type="checkbox"/> Deduct Tax For Unclaimed Employee Benefits
End Date 30-06-2018	<input type="checkbox"/> Deduct Tax For Unsubmitted Tax Exemption Proof

ACCOUNTS

Cost Center Main - AC	Project
---------------------------------	---------

PAYMENT ENTRY

Payment Account
Big Bank - AC

Select Payment Account to make Bank Entry

Note: Read Payroll Setup to know how you can configure Payroll to take the full advantage of ERP+ Human Resources.

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.

Payroll 0002 • Submitted Menu - Cancel

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7 minutes ago

[View Salary Slips](#) [Submit Salary Slip](#)

SELECT EMPLOYEES

Company
Awesome Co

Posting Date
29-06-2018

Payroll Frequency
Monthly

<input type="checkbox"/>	Employee	Employee Name	Department	Designation	
<input type="checkbox"/>	1 EMP/00002: Josh	Josh		HR Manager	▼
<input type="checkbox"/>	2 EMP/00003: John	John		Business D...	▼
<input type="checkbox"/>	3 EMP/00001: Hatsue...	Hatsue Kashiwagi		Analyst	▼

Salary Slip Based on Timesheet

SELECT PAYROLL PERIOD

Start Date
01-06-2018

End Date
30-06-2018

Deduct Tax For Unclaimed Employee Benefits

Deduct Tax For Unsubmitted Tax Exemption Proof

ACCOUNTS

Cost Center
Main - AC

PAYMENT ENTRY

Payment Account
Big Bank - AC

Select Payment Account to make Bank Entry

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).

Booking Salary Accrual and Payment

After verifying the Salary Slips, you can *Submit* them all together by clicking on *Submit Salary Slip*. 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.

Note: Submitting Salary Slips one by one manually will *not* create the Journal Entry to record salary accrual.

The final step is to book the Salary Payment.

Salaries in businesses are usually dealt with extreme privacy. In most cases, the company 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, ERP+ will book separate draft Journal Entries.

New Journal Entry 1 ● Draft Save

Quick Entry

Entry Type	Bank Entry	Posting Date	19-01-2018
Series	JV-	Company	For Testing

	Account	Party	Debit	Credit	
<input type="checkbox"/>	1 Cash - FT			₹ 42,240.00	▼
<input type="checkbox"/>	2 Payroll Payable - FT		₹ 42,240.00		▼

[Add Multiple](#) [Add Row](#)

Reference Number	Total Debit
Reference Date	Total Credit
User Remark	<input type="checkbox"/> Multi Currency
Payment of salary from 2018-01-01 to 2018-01-31	

3. Additional Salary

ERP+ allows you to add additional Salary Components (Is Additional Component) to Salary Slips while processing the payroll. Some examples of Additional Salary could be Performance Bonus, Deputation Allowance, Arrears or other adjustments etc. To create Additional Salary, you can go to: Human resources > Payroll > Additional Salary > New Additional Salary

EMP/00003 ● Submitted
ASC-00001 Menu Cancel

<p>Comments 0</p> <p>ASSIGNED TO Assign +</p> <p>ATTACHMENTS Attach File +</p> <p>TAGS Add a tag ...</p> <p>SHARED WITH </p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 2px;">Company</td> <td style="width: 50%; padding: 2px;">From Date</td> </tr> <tr> <td style="padding: 2px;">Awesome Co</td> <td style="padding: 2px;">01-05-2018</td> </tr> <tr> <td style="padding: 2px;">Employee</td> <td style="padding: 2px;">To Date</td> </tr> <tr> <td style="padding: 2px;">EMP/00003: John</td> <td style="padding: 2px;">30-06-2018</td> </tr> <tr> <td style="padding: 2px;">Employee Name</td> <td style="padding: 2px;">Amount</td> </tr> <tr> <td style="padding: 2px;">John</td> <td style="padding: 2px;">₹ 40,000.00</td> </tr> <tr> <td style="padding: 2px;">Salary Component</td> <td></td> </tr> <tr> <td style="padding: 2px;">Deputation Allowance</td> <td></td> </tr> <tr> <td style="padding: 2px;">Type</td> <td></td> </tr> <tr> <td style="padding: 2px;">Earning</td> <td></td> </tr> </table>	Company	From Date	Awesome Co	01-05-2018	Employee	To Date	EMP/00003: John	30-06-2018	Employee Name	Amount	John	₹ 40,000.00	Salary Component		Deputation Allowance		Type		Earning		
Company	From Date																					
Awesome Co	01-05-2018																					
Employee	To Date																					
EMP/00003: John	30-06-2018																					
Employee Name	Amount																					
John	₹ 40,000.00																					
Salary Component																						
Deputation Allowance																						
Type																						
Earning																						

You can select the Employee to whom you wish to disburse the Additional Salary, the Salary Component and the period for which the employee is entitled to receive the Additional Salary. If the period (From and to dates) consists on multiple payroll periods, the amount will be disbursed on a pro-rata basis.

Note: The Salary Component can also be a deduction component which will add the Additional Salary to the Deductions table in the Salary Slip

4. Retention Bonus

In general, 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 during a particularly crucial business cycle, such as a merger or acquisition, or during a crucial production period.

However, many enterprises also grant bonus to employees who have worked with them for longer periods. ERP+ allows you to configure Retention Bonus for employees which will alert the HR Manager (or any role as configured in Email Alert) on the event of an employee working for a particular period, say 5 years.

You can create new Retention Bonus here: Human resources > Payroll > Retention Bonus

RB-0001 ● Submitted
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<p>Comments 0</p> <p>ASSIGNED TO Assign +</p> <p>ATTACHMENTS Attach File +</p> <p>TAGS Add a tag ...</p>	<p>Company Awesome Co</p> <p>Employee EMP/00001: Jack</p> <p>Bonus Payment Date 31-03-2020</p> <p>Bonus Amount ₹ 5,00,000.00</p>	<p>Employee Name Jack</p> <p>Date of Joining 2015-04-01</p>
--	--	---

5. 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

John ● Submitted
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HR Manager edited this
9 days ago

<p>Employee EMP/00003: John</p> <p>Employee Name John</p> <p>Max Benefits (Yearly) ₹ 1,00,000.00</p> <p>Remaining Benefits (Yearly) ₹ 73,000.00</p>	<p>Date 20-06-2018</p> <p>Payroll Period 2018-19</p> <p>Pro Rata Dispersed Amount ₹ 27,000.00</p> <p>Total Amount ₹ 27,000.00</p>
---	---

	Earning Component	Max Benefit Amount	Amount	
<input type="checkbox"/>	1 Mobile & Telephone Reimbursement	₹ 12,000.00	₹ 12,000.00	▾
<input type="checkbox"/>	2 Medical	₹ 15,000.00	₹ 15,000.00	▾

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.

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 any time before the last payroll, use Deduct Tax for Unclaimed Employee Benefits in Payroll Entry / Salary Slip while processing the Salary.

6. 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

Hatsue Kashiwagi ● Submitted
EBC00002 Menu ▾ Cancel

<p>Comments 0</p> <p>ASSIGNED TO Assign +</p> <p>ATTACHMENTS travel_and_stay.png ✕ Attach File +</p> <p>TAGS Add a tag ...</p> <p>SHARED WITH</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid #ccc; padding: 5px;"> <p>Employee EMP/00001: Hatsue Kashiwagi</p> <p>Employee Name Hatsue Kashiwagi</p> <p>Claim Date 29-06-2018</p> </td> <td style="width: 50%; padding: 5px;"> <p>Earning Component Leave Travel Allowance</p> <p>Max Amount Eligible ₹ 1,00,000.00</p> <p>Claimed Amount ₹ 70,000.00</p> </td> </tr> <tr> <td colspan="2" style="padding: 5px;"> <p>Attachments</p> <p>/files/travel_and_stay.png</p> </td> </tr> </table>	<p>Employee EMP/00001: Hatsue Kashiwagi</p> <p>Employee Name Hatsue Kashiwagi</p> <p>Claim Date 29-06-2018</p>	<p>Earning Component Leave Travel Allowance</p> <p>Max Amount Eligible ₹ 1,00,000.00</p> <p>Claimed Amount ₹ 70,000.00</p>	<p>Attachments</p> <p>/files/travel_and_stay.png</p>	
<p>Employee EMP/00001: Hatsue Kashiwagi</p> <p>Employee Name Hatsue Kashiwagi</p> <p>Claim Date 29-06-2018</p>	<p>Earning Component Leave Travel Allowance</p> <p>Max Amount Eligible ₹ 1,00,000.00</p> <p>Claimed Amount ₹ 70,000.00</p>				
<p>Attachments</p> <p>/files/travel_and_stay.png</p>					

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 any time before the last payroll, use Deduct Tax for Unclaimed Employee Benefits in Payroll Entry / Salary Slip while processing the Salary.

7. Employee Tax Exemption Declaration

At the beginning of a Payroll Period, employees can declare the amount of exemption from their taxable salary they will be claiming at the end of the period by submitting proofs. To create a new Employee Tax Exemption Declaration, go to: Human resources > Payroll > Employee Tax Exemption Declaration > New Employee Tax Exemption Declaration

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HR Manager created this 9 days ago

Employee	Payroll Period
EMP/00003	2018-19
Company	Total Exemption Amount
Awesome Co	₹ 1,34,000.00

	Exemption Sub Category	Exemption Category	Amount	
<input type="checkbox"/>	1 Life Insurance Premium	80C	₹ 50,000.00	▼

HRA EXEMPTION

HRA as per Salary Structure	Annual HRA Exemption
₹ 9,000.00	₹ 84,000.00
Monthly House Rent	Monthly HRA Exemption
₹ 10,000.00	₹ 7,000.00

Rented in Metro City

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.

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 shall also fill out the HRA Exemption. ERP+ will calculate the exemption eligible for HRA and exempt it while calculating the taxable earnings.

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

8. Employee Tax Exemption Proof Submission

Employees are required to submit proofs for all the spending they claim tax exemption for. This is usually done at the end of a Payroll Period, but employees can submit any number of proofs unlike Employee Tax Exemption Declaration.

To create a new Employee Tax Exemption Proof Submission, go to: Human resources > Payroll > Employee Tax Exemption Proof Submission > New Employee Tax Exemption Proof Submission

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Employee
EMP/00001

Company
Awesome Co

Payroll Period
2018-19

Processed in Payroll

Total Exemption Amount
₹ 5,28,000.00

<input type="checkbox"/>	Exemption Sub Category	Exemption Category	Type of Proof	Amount	
<input type="checkbox"/>	1 Life Insurance Premium	80C	Policy Document	₹ 76,000.00	▼
<input type="checkbox"/>	2 Repayment of Home Loan Pri...	80C	Bank Statement	₹ 1,20,000.00	▼
<input type="checkbox"/>	3 Children's Tuition Fees	80C	Receipts	₹ 62,000.00	▼

HRA EXEMPTION

House Rent Payment Amount
₹ 3,60,000.00

✓ Rented in Metro City

Rented From Date
01-01-2018

Rented To Date
31-12-2018

Monthly House Rent
₹ 30,000.00

Monthly Eligible Amount
₹ 22,500.00

Total Eligible HRA Exemption
₹ 2,70,000.00

Attachments
/files/Insurance_Certificate.png

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, ERP+ 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 any time 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. ERP+ 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

9. Payroll Period

A payroll period, in ERP+, 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.

You can create Payroll Period by going to: Human Resources > Payroll Setup > Payroll Period > New Payroll Period

2018-19
Menu ▼
Save

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8 days ago

You created this
10 days ago

Company

Start Date

End Date

TAXABLE SALARY SLABS

	From Amount	To Amount	Percent Deduction	Condition	
<input type="checkbox"/>	₹ 2,50,000.00	₹ 5,00,000.00	5%	date_of_birth>date(1958, 01, 01)	▼
<input type="checkbox"/>	₹ 3,00,000.00	₹ 5,00,000.00	5%	date_of_birth>date(1937, 12, 31) and date_of_birth<date(1958, 01, 01)	▼
<input type="checkbox"/>	₹ 5,00,000.00	₹ 10,00,000.00	20%		▼
<input type="checkbox"/>	₹ 10,00,000.00		30%		▼

Add Row

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 properties of employees. Here is an example of how to define a tax slab for Employees who are aged between 60 and 80 years.

Editing Row #2

From Amount

3,00,000.00

To Amount

5,00,000.00

Percent Deduction

5.000

Condition

date_of_birth>date(1937, 12, 31) and
date_of_birth<date(1958, 01, 01)

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

10. 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 ERP+:

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

Payroll Period

Payroll Period, in ERP+, 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

Salary Component

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, ERP+ 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 ERP+ 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

Earning

Basic • Enabled Menu Save

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

SHARED WITH
+

♥

You edited this 9 days ago

You created this 10 days ago

Abbr

Type

Is Additional Component

Is Tax Applicable

Is Payable

Depends on Leave Without Pay

Do not include in total

Disabled

Description

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.

FLEXIBLE BENEFITS

Is Flexible Benefit

ACCOUNTS

	Company	Default Account	
<input type="checkbox"/>	1 Awesome Co	Salary - AC	▼

[Add Row](#)

- **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 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 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.

FLEXIBLE BENEFITS

Is Flexible Benefit

Max Benefit Amount (Yearly)

Pay Against Benefit Claim

Only Tax Impact (Cannot Claim But Part of Taxable Income)

Create Separate Payment Entry Against Benefit Claim

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.

Deduction

Income Tax Not Saved Menu Save

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

SHARED WITH
+

You edited this 9 days ago

You created this 10 days ago

Abbr

Type

Disabled

Description

Is Additional Component

Is Payable

Depends on Leave Without Pay

Do not include in total

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.

Variable Based On Taxable Salary

ACCOUNTS

<input type="checkbox"/>	Company	Default Account
<input type="checkbox"/>	1 Awesome Co	Income Tax Collected - AC

- 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 Tax slabs configured in Payroll Period on all the total taxable salary.

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.
- **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.

Preview Salary Slip Assign Salary Structure

Company Awesome Co	Is Active Yes
	Payroll Frequency Monthly
<input type="checkbox"/> Salary Slip Based on Timesheet	Leave Encashment Amount Per Day ₹ 2,000.00
	Max Benefits (Amount) ₹ 1,00,000.00

EARNING

<input type="checkbox"/>	Component	Abbr	St...	Formula	Amount	
<input type="checkbox"/>	1 Basic	B	<input type="checkbox"/>	base		▼
<input type="checkbox"/>	2 Dearness Allowan...	DA	<input type="checkbox"/>	base*0.2		▼
<input type="checkbox"/>	3 House Rent Allow...	HRA	<input type="checkbox"/>	base*0.3		▼
<input type="checkbox"/>	4 Medical	MED	<input type="checkbox"/>			▼
<input type="checkbox"/>	5 Conveyance	C	<input type="checkbox"/>		₹ 1,600.00	▼
<input type="checkbox"/>	6 Leave Travel Allo...	LTA	<input type="checkbox"/>			▼
<input type="checkbox"/>	7 Mobile & Telepho...	MOB	<input type="checkbox"/>			▼

DEDUCTION

<input type="checkbox"/>	Component	Abbr	St...	Formula	Amount	
<input type="checkbox"/>	1 Income Tax	IT	<input type="checkbox"/>			▼
<input type="checkbox"/>	2 Professional Tax	PT	<input type="checkbox"/>			▼

ACCOUNT

Mode of Payment Wire Transfer	Payment Account Big Bank - AC
---	---

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.

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)

Salary Slip Based on Timesheet

Salary Component

Bonus

Salary Component for timesheet based payroll.

Hour Rate

50.00

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, 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,

Condition and Formula

Editing Row #1 Insert Above ▲

Salary Component
Basic Salary

Abbr
BS

Condition
base > 10000

Amount based on formula

Formula
base*.2

1	Professional Tax
2	TDS
3	TDS

Add new row

Condition and Amount

Editing Row #3 Insert Above ▲

Salary Component
TDS

Abbr
T

Condition
employment_type=="Intern"

Amount based on formula

Formula
base*.1

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

Account Details

ACCOUNT	
Mode of Payment	Payment Account
Cash	Cash - WP

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

Finally, Save the Salary Structure.

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 ERP+ 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 ERP+ to manage LWP, leave the LWP unchecked in all of the Earning Types and Deduction Types.

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

Hatsue Kashiwagi • Submitted
SSA-00006 📄 Menu ▾ Cancel

<p>Comments 0</p> <p>ASSIGNED TO</p> <p>Assign +</p> <p>ATTACHMENTS</p> <p>Attach File +</p> <p>TAGS</p> <p>Add a tag ...</p> <p>SHARED WITH</p>	<p>Employee</p> <p>EMP/00001: Hatsue Kashiwagi</p> <p>Employee Name</p> <p>Hatsue Kashiwagi</p> <p>Salary Structure</p> <p>2018-19-1</p> <hr/> <p>Base</p> <p>₹ 75,000.00</p>	<p>From Date</p> <p>01-01-2018</p> <p>To Date</p> <p><input type="text"/></p> <p>Company</p> <p>Awesome Co</p> <hr/> <p>Variable</p> <p><input type="text"/></p>
--	---	--

Processing Payroll

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.

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

Payroll Entry

New Payroll Entry 1 ● Not Saved

SELECT EMPLOYEES

Company Awesome Co	Branch
Posting Date 29-06-2018	Department
Payroll Frequency Monthlv	Designation

Get Employee Details

<input type="checkbox"/>	Employee	Employee Name	Department	Designation	
<input type="checkbox"/>	1 EMP/00002: Josh	Josh		HR Manager	▼
<input type="checkbox"/>	2 EMP/00003: John	John		Business D...	▼
<input type="checkbox"/>	3 EMP/00001: Hatsue...	Hatsue Kashiwagi		Analyst	▼

Salary Slip Based on Timesheet

SELECT PAYROLL PERIOD

Start Date 01-06-2018	<input type="checkbox"/> Deduct Tax For Unclaimed Employee Benefits
End Date 30-06-2018	<input type="checkbox"/> Deduct Tax For Unsubmitted Tax Exemption Proof

ACCOUNTS

Cost Center Main - AC	Project
---------------------------------	---------

PAYMENT ENTRY

Payment Account
Big Bank - AC

Select Payment Account to make Bank 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.

Payroll 0002 • Submitted Menu - Cancel

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

SHARED WITH
+

You edited this
a few seconds ago

You created this
7 minutes ago

[View Salary Slips](#) [Submit Salary Slip](#)

SELECT EMPLOYEES

Company
Awesome Co

Posting Date
29-06-2018

Payroll Frequency
Monthly

<input type="checkbox"/>	Employee	Employee Name	Department	Designation	
<input type="checkbox"/>	1 EMP/00002: Josh	Josh		HR Manager	▼
<input type="checkbox"/>	2 EMP/00003: John	John		Business D...	▼
<input type="checkbox"/>	3 EMP/00001: Hatsue...	Hatsue Kashiwagi		Analyst	▼

Salary Slip Based on Timesheet

SELECT PAYROLL PERIOD

Start Date
01-06-2018

End Date
30-06-2018

Deduct Tax For Unclaimed Employee Benefits

Deduct Tax For Unsubmitted Tax Exemption Proof

ACCOUNTS

Cost Center
Main - AC

PAYMENT ENTRY

Payment Account
Big Bank - AC

Select Payment Account to make Bank Entry

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 checking, 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.

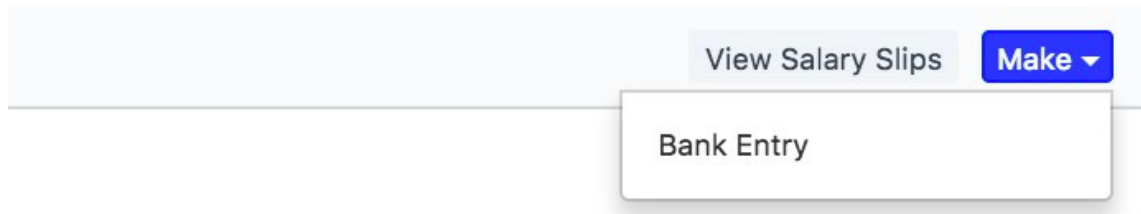
Booking Salaries in Accounts

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

Salaries in businesses are usually dealt with extreme privacy. In most cases, the company 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, ERP+ will book separate draft Journal Entries.

New Journal Entry 1 ● Draft Save

Quick Entry

Entry Type	Bank Entry	Posting Date	19-01-2018	
Series	JV-	Company	For Testing	

	Account	Party	Debit	Credit	
<input type="checkbox"/>	1 Cash - FT			₹ 42,240.00	▼
<input type="checkbox"/>	2 Payroll Payable - FT		₹ 42,240.00		▼

Reference Number	Total Debit
<input style="border: 1px solid red;" type="text"/>	<input style="background-color: #e0e0e0;" type="text"/>
Reference Date	Total Credit
<input style="border: 1px solid red;" type="text"/>	<input style="background-color: #e0e0e0;" type="text"/>
User Remark	<input type="checkbox"/> Multi Currency
Payment of salary from 2018-01-01 to 2018-01-31	

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

Salary Slip

Hatsue Kashiwagi • Submitted
Sal Slip/EMP/00001/00... Menu - Cancel

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

SHARED WITH

You edited this a minute ago

You created this 2 minutes ago

<p>Posting Date 29-06-2018</p> <p>Employee EMP/00001: Hatsue Kashiwagi</p> <p>Employee Name Hatsue Kashiwagi</p> <p>Designation Analyst</p> <p>Branch <input type="text"/></p>	<p>Status Submitted</p> <p>Company Awesome Co</p> <p>Letter Head <input type="text" value="Awesome Letter Head"/></p>																																
<p><input type="radio"/> Salary Slip Based on Timesheet</p> <p>Start Date 01-05-2018</p> <p>End Date 31-05-2018</p>																																	
<p><input type="radio"/> Deduct Tax For Unclaimed Employee Benefits</p> <p><input type="radio"/> Deduct Tax For Unsubmitted Tax Exemption Proof</p>																																	
<p>EARNING & DEDUCTION</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Earning</th> <th colspan="2">Deduction</th> </tr> <tr> <th><input type="checkbox"/> Component</th> <th>Amount</th> <th><input type="checkbox"/> Component</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Basic</td> <td>₹ 75,000.00</td> <td><input type="checkbox"/> Income Tax</td> <td>₹ 18,605.00</td> </tr> <tr> <td><input type="checkbox"/> Dearness Allowance</td> <td>₹ 15,000.00</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> House Rent Allowance</td> <td>₹ 22,500.00</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Medical</td> <td>₹ 1,250.00</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Conveyance</td> <td>₹ 1,600.00</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Mobile & Telephone R...</td> <td>₹ 1,000.00</td> <td></td> <td></td> </tr> </tbody> </table>		Earning		Deduction		<input type="checkbox"/> Component	Amount	<input type="checkbox"/> Component	Amount	<input type="checkbox"/> Basic	₹ 75,000.00	<input type="checkbox"/> Income Tax	₹ 18,605.00	<input type="checkbox"/> Dearness Allowance	₹ 15,000.00			<input type="checkbox"/> House Rent Allowance	₹ 22,500.00			<input type="checkbox"/> Medical	₹ 1,250.00			<input type="checkbox"/> Conveyance	₹ 1,600.00			<input type="checkbox"/> Mobile & Telephone R...	₹ 1,000.00		
Earning		Deduction																															
<input type="checkbox"/> Component	Amount	<input type="checkbox"/> Component	Amount																														
<input type="checkbox"/> Basic	₹ 75,000.00	<input type="checkbox"/> Income Tax	₹ 18,605.00																														
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<input type="checkbox"/> Medical	₹ 1,250.00																																
<input type="checkbox"/> Conveyance	₹ 1,600.00																																
<input type="checkbox"/> Mobile & Telephone R...	₹ 1,000.00																																
<p>Gross Pay ₹ 1,16,350.00</p> <p>Total Deduction ₹ 18,605.00</p>																																	

11. 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 setup properly, ERP+ simplifies most of the tax related calculations by automatically calculating tax deductions while generating Salary Slips. Here's how you can configure ERP+ to ease your payroll processing -

Income Tax Exemption

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

ERP+ allows you to configure Tax Slabs as part of every Payroll Period and the applies tax on each Salary based on projected annual earnings of the employee. Tax thus calculated will be added to the Salary Slip for deduction Salary Component configured *Variable Based on Taxable Salary*. Employees are required to declare the exemption amount they plan to claim at the end of the fiscal year so that the payroll deductions for tax will be calculated based on the projected annual earnings less the exemption. Employees can declare this through Employee Tax Exemption Declaration, the total of which will be exempted from annual taxable earnings of the employee.

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, from the next payroll onwards the exemption will be applied from the next payroll. 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 spending for filing via Employee Tax Exemption Proof Submission. In the last payroll of the Payroll Period, ERP+ checks for proof submissions of employees and if not found, tax for the exempted income will be added to the standard deduction component.

Employee Tax Exemption Category

Exemptions from taxable salary are usually restricted to spending on particular categories decided by government or regulatory agencies. ERP+ 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

80C Menu Save

Comments 0

ASSIGNED TO
Assign +

Max Amount

Is Active

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 Sub Category by going to: Human resources > Payroll Setup > Employee Tax Exemption Sub Category > New Employee Tax Sub Exemption Category

Life Insurance Premium Menu Save

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

Tax Exemption Category

Max Amount

Is Active

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. ERP+ will calculate the exemption eligible for HRA and exempt it while calculating the taxable earnings.

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

Options in Payroll Entry and Salary Slip

ERP+ 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 ERP+ 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 ERP+ 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

Payroll Period

Payroll Period 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.

Salary Component

To enable automatic tax deduction based on Tax slabs configured in Payroll Period, you have to configure a Salary Component of type *Deduction* with *Variable Based on Taxable Salary* option enabled. If you enable this, the component will be considered as the standard Tax deduction component and tax will be calculated based on the Tax slabs configured in Payroll Period on all the total taxable salary.

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 Payroll Period 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 Payroll Period, 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 deduction in each payroll rather than ERP+ automatically calculating the deductions based on 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.

1.8 Topic: Other

1. Human Resources Reports
2. Human Resource Setup
3. Loan Management
4. Fleet Management
5. Employee Advance
6. Expense Claim
7. Travel Request

1. Human Resources Reports

Employee Leave Balance

Employee Leave Balance Report shows employees and their respective balance leaves under various leave types. Report is generated as per the number of allowed leaves.

Employee Leave Balance

Menu Refresh

Sr No	Fiscal Year	Employee	Employee Name	Department	Casual Le...	Casual Le...	Casual Le...	Compensa...	Compensa...	Compensa...	en
	2015										
1	2015	EMP/0025	Josephine		0.000	0.000	0.000	0.000	0.000	0.000	
2	2015	EMP/0026	AB		0.000	0.000	0.000	0.000	0.000	0.000	
3	2015	EMP/0023	John Doe2		0.000	0.000	0.000	0.000	0.000	0.000	
4	2015	EMP/0024	Raju Singh		0.000	0.000	0.000	0.000	0.000	0.000	
5	2015	EMP/0020	hussam Almarzoq		0.000	0.000	0.000	0.000	0.000	0.000	
6	2015	EMP/0022	Greg P		0.000	0.000	0.000	0.000	0.000	0.000	
7	2015	EMP/0021	James Bond		0.000	0.000	0.000	0.000	0.000	0.000	
8	2015	EMP/0019	Каренская Екатерина		0.000	0.000	0.000	0.000	0.000	0.000	
9	2015	EMP/0018	moaz awad almubarak		0.000	0.000	0.000	0.000	0.000	0.000	
10	2015	EMP/0017	Doe John		0.000	0.000	0.000	0.000	0.000	0.000	
11	2015	EMP/0012	Pancho		0.000	0.000	0.000	0.000	0.000	0.000	
12	2015	EMP/0016	m.m.,		0.000	0.000	0.000	0.000	0.000	0.000	
13	2015	EMP/0015	Chirag		0.000	0.000	0.000	0.000	0.000	0.000	

Employee Birthday

Employee Birthday Report shows Birthdays of your employees.

Employee Birthday

Menu Refresh

Sr No	Employee	Name	Date of Birth	Branch	Department	Designation	Gender	Company
1	EMP/0009	Vakhita Ryzhev	09-03-1982				Male	Wind Power LLC
2	EMP/0024	Raju Singh	09-01-1977				Male	Wind Power LLC
3	EMP/0025	Josephine	09-01-1368				Male	Wind Power LLC
4	EMP/0026	AB	09-08-1983				Male	Wind Power LLC

Employee Information

Employee Information Report shows Report View of important information recorded in Employee master.

Report: Employee - Employee Information

Menu Refresh

Add Filter

Sr.	ID	Employee Number	Date of Joining	Branch	Department	Designation	Gender	Status	Company
1	EMP/0001		10-10-2001				Female	Active	Wind Power LLC
2	EMP/0002		09-16-1976				Female	Active	Wind Power LLC
3	EMP/0003		06-16-2000				Female	Active	Wind Power LLC
4	EMP/0004		07-01-1969				Female	Active	Wind Power LLC
5	EMP/0005		12-24-1999				Male	Active	Wind Power LLC
6	EMP/0006		08-05-1981				Female	Active	Wind Power LLC
7	EMP/0007		06-10-2006				Male	Active	Wind Power LLC
8	EMP/0008		10-21-1993				Female	Active	Wind Power LLC
9	EMP/0009		09-06-2005				Male	Active	Wind Power LLC
10	EMP/0010		12-25-2007				Female	Active	Wind Power LLC
11	EMP/0011		08-08-2012		Sales	Client Advisor	Female	Active	Wind Power LLC
12	EMP/0012		08-05-2015				Male	Active	Wind Power LLC
13	EMP/0013		08-04-2015				Male	Active	Wind Power LLC
14	EMP/0014		08-11-2015				Male	Active	Wind Power LLC
15	EMP/0015		08-15-2015				Male	Active	Wind Power LLC

Employee Holiday Attendance

Employee Holiday Attendance shows the list of Employees who attended on Holidays.

Employee Holiday Attendance

Menu Refresh

Sr No	Employee	Name	Date	Status	Holiday
1	EMP/0010	Charmaine Gaudreau	01-04-2015	Present	Sunday
2	EMP/0001	Dikman Shervashidze Shervashid...	01-04-2015	Present	Sunday
3	EMP/0008	Gabrielle Loftus	01-04-2015	Present	Sunday
4	EMP/0003	Hatsue Kashiwagi	01-04-2015	Present	Sunday
5	EMP/0007	Michał Sobczak	01-04-2015	Present	Sunday
6	EMP/0004	Nuran Verkleij	01-04-2015	Present	Sunday
7	EMP/0006	Tilde Lindqvist	01-04-2015	Present	Sunday
8	EMP/0009	Vakhita Rytzaev	01-04-2015	Present	Sunday
9	EMP/0002	Zukutakiitoteka	01-04-2015	Present	Sunday
10	EMP/0005	Дмитрий Пирогов	01-04-2015	Present	Sunday

Monthly Salary Register

Monthly Salary Register shows net pay and its components of employee(s) at a glance.

Monthly Salary Register

Menu Refresh

Sep 2015 Employee Wind Power LLC

Sr No	Employee	Employee Name	Branch	Department	Designation	Company	Month	Leave Without Pay	Payment Days
1	EMP/0003	Hatsue Kashiwagi				Wind Power LLC	09		30.000
2	EMP/0004	Nuran Verkleij				Wind Power LLC	09		30.000
3	Total								60.000

Monthly Attendance Sheet

Monthly Attendance Sheet shows monthly attendance of selected employee at a glance.

Monthly Attendance Sheet

Menu Refresh

Aug		2015		EMP/0001		Wind Power LLC													
Sr No	Employee	Employee Name	Branch	Department	Designation	Company	1	2	3	4	5	6	7	8	9	10	11	12	
1	EMP/0001	Dikman Shervashidze...				Wind Power LLC	A	A	A	A	P	A	A	A	A	A	A	A	

2. Human Resource Setup

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

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).

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

Payroll (Salary) Setup

In ERP+, 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 ERP+ simplifies most of the payroll processing for you.

If you intend to configure ERP+ 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.

Recruitment

It is important for enterprises to plan their manpower recruitment for future periods. ERP+ 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

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

3. Loan Management

This module enables companies which provides loans to define and manage loans. Employees can request loans, which are then reviewed and approved. For the approved loans, repayment schedule for the entire loan cycle can be generated and automatic deduction from salary can also be set up.

Loan Type

To create a new Loan Type, go to: Human Resources > Loan Management > Loan Type > New Loan Type

Configure Loan limit and Rate of interest.

Home Loan ● Enabled Menu Save

<p>Comments 0</p> <p>ASSIGNED TO Assign +</p> <p>ATTACHMENTS Attach File +</p>	<p>Maximum Loan Amount <input type="text" value="5,00,000.00"/></p> <p>Rate of Interest (%) Yearly <input type="text" value="9.200"/></p>	<p><input type="checkbox"/> Disabled</p> <p>Description <input type="text" value="Home Loan"/></p>
---	---	--

Loan Application

Employee can apply for loan by going to: Human Resources > Loan Management > Loan Application > New Loan Application

New Loan Application 1 ● Not Saved Save

<p>Applicant Type <input type="text" value="Employee"/></p> <p>Applicant <input type="text" value="EMP/00002"/></p> <p>Applicant Name <input type="text" value="Test employee"/></p>	<p>Posting Date <input type="text" value="05-07-2018"/></p> <p>Status <input type="text" value="Open"/></p> <p>Company <input type="text" value="Wind Power LLC"/></p>
<p>LOAN INFO</p> <p>Loan Type <input type="text" value="Personal Loan"/></p> <p>Loan Amount <input type="text" value="20,000.00"/></p> <p>Required by Date <input type="text" value="05-25-2018"/></p>	
<p>REPAYMENT INFO</p> <p>Repayment Method <input type="text" value="Repay Fixed Amount per Period"/></p> <p>Rate of Interest <input type="text" value="8.4%"/></p>	

Reason

Monthly Repayment Amount

In the Loan Application,

- Enter Employee details and Loan details
- Select the repayment method, and based on your selection enter Repayment Period in Months or repayment Amount

On save, Employee can see Repayment Information and make changes if required before submitting.

REPAYMENT INFO

Repayment Method

Repay Over Number of Periods

Repayment Amount

₹ 11,445.00

Rate of Interest

9.2%

Repayment Period in Months

24

Total Payable Interest

₹ 24,680.00

Total Payable Amount

₹ 2,74,680.00

Loan

Once the Loan is approved, Manager can create Loan record for the Employee. Human Resources > Loan Management > Loan > New Loan

LN0036 • Draft Menu

<p>SHARED WITH</p> <p><input type="button" value="+"/></p> <p><input type="button" value="♥"/></p> <p>You edited this a few seconds ago</p> <p>You created this a minute ago</p>	<p>Applicant Type Employee</p> <p>Applicant EMP/00002</p> <p>Applicant Name Test employee</p> <p>Loan Application LA/00001</p> <p>Loan Type Personal Loan</p>	<p>Posting Date 05-16-2018</p> <p>Company Wind Power LLC</p> <p>Status Disbursed</p> <p><input type="checkbox"/> Repay from Salary</p>
<p>LOAN DETAILS</p> <p>Loan Amount 10,000.00</p> <p>Rate of Interest (%) / Year 8.4%</p> <p>Disbursement Date 05-02-2018</p> <p>Repayment Start Date 05-18-2018</p>		
<p>Repayment Method Repay Fixed Amount per Period</p> <p>Repayment Period in Months 11</p> <p>Monthly Repayment Amount 1,000.00</p>		

In the Loan

- Enter Employee and Loan Application
- Check "Repay from Salary" if the loan repayment will be deducted from the salary
- Enter Disbursement Date, Repayment Start Date, and Account Info
- If the amount has been disbursed and status is set to "Disbursed", as soon as you hit save, the repayment schedule is generated.
- The first repayment payment date would be set as per the "Repayment Start Date".

REPAYMENT SCHEDULE

<input type="checkbox"/>	Payment Date	Principal Amount	Interest Amount	Total Payment	Balance Loan Amo...	
<input type="checkbox"/>	1 05-18-2018	\$ 930.00	\$ 70.00	\$ 1,000.00	\$ 9,070.00	▼
<input type="checkbox"/>	2 06-18-2018	\$ 937.00	\$ 63.00	\$ 1,000.00	\$ 8,133.00	▼
<input type="checkbox"/>	3 07-18-2018	\$ 943.00	\$ 57.00	\$ 1,000.00	\$ 7,190.00	▼
<input type="checkbox"/>	4 08-18-2018	\$ 950.00	\$ 50.00	\$ 1,000.00	\$ 6,240.00	▼
<input type="checkbox"/>	5 09-18-2018	\$ 956.00	\$ 44.00	\$ 1,000.00	\$ 5,284.00	▼
<input type="checkbox"/>	6 10-18-2018	\$ 963.00	\$ 37.00	\$ 1,000.00	\$ 4,321.00	▼
<input type="checkbox"/>	7 11-18-2018	\$ 970.00	\$ 30.00	\$ 1,000.00	\$ 3,351.00	▼
<input type="checkbox"/>	8 12-18-2018	\$ 977.00	\$ 23.00	\$ 1,000.00	\$ 2,374.00	▼
<input type="checkbox"/>	9 01-18-2019	\$ 983.00	\$ 17.00	\$ 1,000.00	\$ 1,391.00	▼
<input type="checkbox"/>	10 02-18-2019	\$ 990.00	\$ 10.00	\$ 1,000.00	\$ 401.00	▼
<input type="checkbox"/>	11 03-18-2019	\$ 401.00	\$ 3.00	\$ 404.00		▼
Add Row						

Loan Repayment for Members

- After submitting the document, if the status is "Disbursed" and "Repay from Salary" is unchecked, you can click on "Make Repayment Entry" and select the payments which haven't been paid till date.
- After selecting the rows, you will be routed to Journal Entry where the selected payments will be added and placed in their respective Debit/ Credit accounts.
- On submitting the Journal Entry, "Paid" will be checked in the payment rows of the Repayment Schedule, for which the Journal entry has been created.

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.

Katy Holmes ● Not Saved

Sal Slip/EMP/0005/00002  Menu 

Arrear Amount	<input type="text" value="0.00"/>	Total Deduction	₹ 31,500.00
Leave Encashment Amount	<input type="text" value="0.00"/>	Loan Repayment	₹ 11,445.00
Gross Pay	₹ 59,500.00	Net Pay	₹ 28,000.00
		Gross Pay + Arrear Amount + Encashment Amount - Total Deduction - Loan Repayment	
		Rounded Total	₹ 28,000.00

4. 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 ERP+:

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

Vehicle Set Up

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

To create a new Vehicle, go to: Human Resources > Fleet Management > Vehicle

- Enter License Plate, Make, Model, Odometer Value, Fuel Type and Fuel UOM for a quick entry.

New Vehicle

Close Save

License Plate
MH01AB0786

Make
Maruti

Model
VXI

Odometer Value(Last)
5000

Fuel Type
Petrol

Fuel UOM
Litre

Ctrl+enter to save | [Edit in full page](#)

- Enter details like Insurance, Chassis, Vehicle Value, Location and Employee.

DETAILS	
Odometer Value(Last) 5000	Chassis No 12345678AABC
Acquisition Date 09-20-2016	Vehicle Value 300,000.00
Location Mumbai	Employee EMP/0011

INSURANCE DETAILS	
Insurance Company Bharat Insurance Co. Ltd.	Start Date 09-20-2016
Policy No 123490855	End Date 09-20-2017

- Enter Vehicle attributes like color, wheels, doors and last carbon check

ADDITIONAL DETAILS	
Fuel Type Petrol	Color Black
Fuel UOM Litre	Wheels 4
Last Carbon Check 09-20-2016	Doors 4

Add a comment	Comment
<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>	

Vehicle Log

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

To create a new Vehicle Log, go to: Human Resources > Fleet Management > Vehicle Log

- Enter License Plate, Employee, Date, Odometer reading for a quick entry.

New Vehicle Log
Close **Save**

Series

License Plate

Employee

Date

Odometer

Ctrl+enter to save | [Edit in full page](#)

- Enter Refueling details, Service details if applicable.

REFUELLING DETAILS ^

Fuel Qty

Supplier

Fuel Price

Invoice Ref

SERVICE_DETAILS ^

	Service Item	Type	Frequency	Expense	
1	Oil Change	Inspection	Mileage	\$ 500.00	▼
2	<input style="border: 1px dashed gray;" type="text" value="Oil Change"/>	Inspection	Mileage	Expense	▼

Make Expense Claim

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

EMP/0011
VXI

ODOMETER READING


Date
09-20-2016

Odometer
6000

REFUELLING DETAILS ▾

SERVICE_DETAILS ▾

Make Expense Claim



When you click on 'Make Expense Claim',

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

Expense Claim is pending approval. Only the Expense Approver can update status.

Series Total Claimed Amount

EXP

Approver

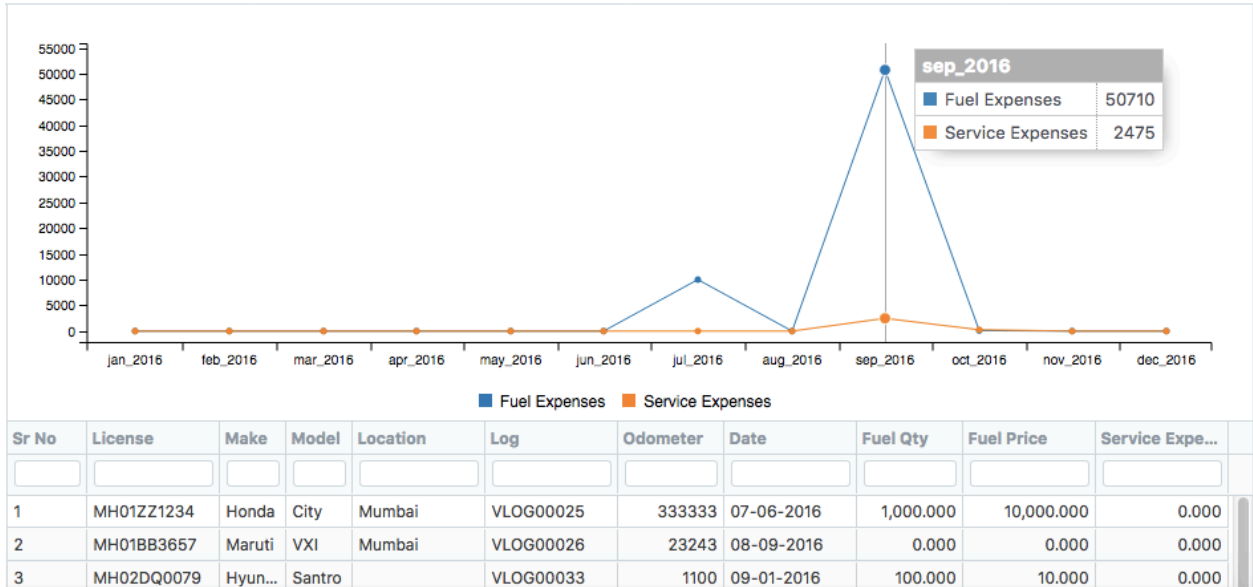
A user with "Expense Approver" role

	Expense Date	Expense Clai...	Description	Claim Amount	Sanctioned A...	
1	09-20-2016		Vehicle Expens...	\$ 550.00		▾

Add new row

Vehicle Expenses Report

- To track and monitor Vehicle Expenses you can use the Vehicle Expenses report. This report gives a one stop view of all your vehicle expenses month wise.



5. Employee Advance

Sometimes employees go outside for company's work and company pays some amount for their expenses in advance. In that time, the employee can create Employee Advance form and 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 make a new Employee Advance, go to: Human Resources > Travel and Expense Claims > Employee Advance > New Employee Advance

New Employee Advance 1 ● Not Saved Save

<p>Series <input type="text" value="EA-"/></p> <p>Employee <input type="text" value="EMP/0001"/></p> <p>Employee Name <input type="text" value="Nabin Hait"/></p>	<p>Posting Date <input type="text" value="07-12-2017"/></p>
<p>Purpose <input style="height: 60px;" type="text" value="For client site visit"/></p>	<p>Advance Amount <input type="text" value="10,000.00"/></p> <p>Claimed Amount <input type="text"/></p>
<p>Status <input type="text" value="Draft"/></p> <p>Company <input type="text" value="Test Company"/></p>	<p>Advance Account <input type="text" value="Employee Cash Advance - TC"/></p> <p>Mode of Payment <input type="text"/></p>

Set the Employee ID, date, purpose and requested amount and “Save” the record.

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, approver can submit the Employee Advance form or reject the request.

Make Payment Entry

After submission of Employee Advance record, accounts user will be able to create payment entry via Journal Entry or Payment Entry form. The payment entry will look like following:

Employee Advance - TC ● Bank Entry

JV-00003-4 Menu Cancel

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag...

SHARED WITH
+

♥ 0

You edited this
2 days ago

You created this
2 days ago

Ledger

Entry Type
Bank Entry

Posting Date
09-10-2017

Company
Test Company

	Account	Party	Debit	Credit	
1	Employee Advance - TC	EMP/0001	₹ 100.00	₹ 0.00	▼
2	Cash - TC		₹ 0.00	₹ 100.00	▼

Reference Number
12

Reference Date
31-10-2017

Total Debit
₹ 100.00

Total Credit
₹ 100.00

EMP/0001 ● Submitted

PE-00001-1 Menu Cancel

You created this
2 days ago

Paid Amount (INR)
₹ 100.00

REFERENCE ^

Allocate Payment Amount

	Type	Name	Total Amount (INR)	Outstanding (INR)	Allocated (INR)	
1	Employee Advance	EA-00003	100	100	100	▼

WRITEOFF

Total Allocated Amount (INR)
₹ 100.00

Unallocated Amount (INR)
₹ 0.00

Difference Amount (INR)
₹ 0.00

On submission of payment entry, the paid amount and status will be updated in Employee Advance record.

Adjust advances on Expense Claim

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

ADVANCE PAYMENTS						
<input type="checkbox"/>	Employee Advance	Posting Date	Advance Paid	Unclaimed amount	Allocated amount	
<input type="checkbox"/>	1 EA-00002	09-10-2017	₹ 200.00	₹ 199.00	100	▼
<input type="checkbox"/>	2 EA-00003	09-10-2017	100.00	99.00	99.00	▼

Add Row

6. Expense Claim

Expense Claim is made when Employee's 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 make a new Expense Claim, go to: Human Resources > Travel and Expense Claims > Expense Claim > New Expense Claim

Tom Hagen ● Unpaid EXP00001 Menu Cancel

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag...

SHARED WITH
+

♥ 0

View Make

Approval Status	Total Claimed Amount
Approved	₹ 2,090.00
Approver	Total Sanctioned Amount
Administrator	₹ 2,090.00
<small>A user with "Expense Approver" role</small>	

<input type="checkbox"/>	Expense Date	Expense Claim Type	Description	Claim Amount	Sanctioned Amount	
<input type="checkbox"/>	1 01-12-2016	Travel		₹ 890.00	₹ 890.00	▼
<input type="checkbox"/>	2 08-12-2016	Food		₹ 1,200.00	₹ 1,200.00	▼

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

Set Account for Employee

Set employee's expense account on the employee form, system books an expense amount of an employee under this account.

Tom Hagen ● Active EMP/0001 Menu Save

+

♥ 0

You edited this
13 minutes ago

You created this
14 minutes ago

Full Name	Date of Joining
<input type="text" value="Tom Hagen"/>	<input type="text" value="01-10-2016"/>
Company	Date of Birth
<input type="text" value="Sula Wine"/>	<input type="text" value="01-12-1956"/>
User ID	<small>You can enter any date manually</small>
<input type="text"/>	Gender
<small>System User (login) ID. If set, it will become default for all HR forms.</small>	<input type="text" value="Male"/>

ACCOUNTING

<input type="checkbox"/>	Company	Account	
<input type="checkbox"/>	1 Sula Wine	Expense Claim - FT	▼

Add new row

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.

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 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.

Booking the Expense

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

Sr No	Posting Date	Account	Debit	Credit	Voucher Type	Voucher No	Against Account	Party Type	Party
1	20-12-2016	Expense Claim - FT	0.000	2,090.000	Expense Claim	EXP00001	Travel Expenses -...	Employee	EMP/0001
2	20-12-2016	Marketing Expenses - FT	1,200.000	0.000	Expense Claim	EXP00001	EMP/0001		
3	20-12-2016	Travel Expenses - FT	890.000	0.000	Expense Claim	EXP00001	EMP/0001		
4		Totals	2,090.000	2,090.000					

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

Unclaimed Expense Claims

Menu Refresh

Sr No	Employee	Employee Name	Expense Claim	Sanctioned Amo...	Paid Amount	Outstanding Amount
1	EMP/0001	Tom Hagen	EXP00001	₹ 2,090.00	₹ 0.00	₹ 2,090.00
2	EMP/0002	Marlon Brando	EXP00002	₹ 350.00	₹ 0.00	₹ 350.00
3	EMP/0005	Robert Cruise	EXP00003	₹ 600.00	₹ 0.00	₹ 600.00

Payment for Expense Claim

To make payment against the expense claim, user has to click on Make > Bank Entry

Expense Claim

Robert Cruise ● Unpaid EXP00003 Menu

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag...

SHARED WITH

View

Approval Status Approved	Total Claimed Amount ₹ 600.00
Approver Administrator	Total Sanctioned Amount ₹ 600.00

A user with "Expense Approver" role

	Expense Date	Expense Claim Type	Description	Claim Amount	Sanctioned Amount	
<input type="checkbox"/>	1 08-12-2016	Travel		₹ 600.00	₹ 600.00	▼

Payment Entry

Entry Type Bank Entry	Posting Date 20-12-2016
Company Sula Wine	

	Account	Party	Debit	Credit	
<input type="checkbox"/>	1 Expense Claim - FT	EMP/0005	₹ 600.000	₹ 0.000	▼
<input type="checkbox"/>	2 HDFC - FT		₹ 0.000	₹ 600.000	▼

Reference Number 65454	Total Debit ₹ 600.00
Reference Date 07-12-2016	Total Credit ₹ 600.00

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: Accounts > 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.

AMOUNT

Paid Amount (USD)

500.00

REFERENCE ^

Allocate Payment Amount

<input type="checkbox"/>	Type	Name	Total Amount	Outstanding	Allocated	
<input type="checkbox"/> 1	Expense Claim	EXP00001	500	500	500	▼

Add Row

WRITEOFF

Total Allocated Amount (USD)

\$ 500.00

Unallocated Amount (USD)

0.00

Difference Amount (USD)

Linking with Task & Project

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

New Expense Claim 1 ● Not Saved

Save

<input type="checkbox"/>	Expense Date	Expense Claim Type	Description	Claim Amount	Sanctioned Amount	
<input type="checkbox"/> 1	05-01-2018	Travel	Travelled locally in Pune	270.00	270.00	▼

Add Row

Posting Date

05-30-2018

From Employee

EMP/00001

Employee Name

Vito Corleone

Project

Design New Sliding Door Wardrob

Design New Sliding Door Wardrobe
Open, Medium, Yes

[+ Create a new Project](#)

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Remark

This will update the Project cost with the Expense claim amounts

Design New Sliding Door Wardrobe ● Not Saved

Menu Save

START AND END DATES ▾

COSTING AND BILLING ▲

Estimated Cost

56,000.00

Total Sales Amount (via Sales Order)

Total Costing Amount (via Timesheets)

Total Billable Amount (via Timesheets)

Total Expense Claim (via Expense Claims)

\$ 270.00

Total Billed Amount (via Sales Invoices)

Total Purchase Cost (via Purchase Invoice)

Total Consumed Material Cost (via Stock Entry)

Company

Woodcraft Decors

Default Cost Center

7. 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.

Editing Row #1

🗑
Insert Below
Insert Above
▲

<p>Travel From</p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="Zurich"/>	<p>Departure Datetime</p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="25-10-2018 18:00:00"/>
<p>Travel To</p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="Mumbai"/>	<p>Arrival Datetime</p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="26-07-2018 09:00:00"/>
<p>Mode of Travel</p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="Flight"/>	<p><input checked="" type="checkbox"/> Lodging Required</p>
<p>Meal Preference</p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="Vegetarian"/>	<p>Preferred Area for Lodging</p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="Matunga"/>
<p><input checked="" type="checkbox"/> Travel Advance Required</p>	<p>Check-in Date</p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="26-10-2018"/>
<p>Advance Amount</p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="2000"/>	<p>Check-out Date</p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="28-10-2018"/>

Other Details