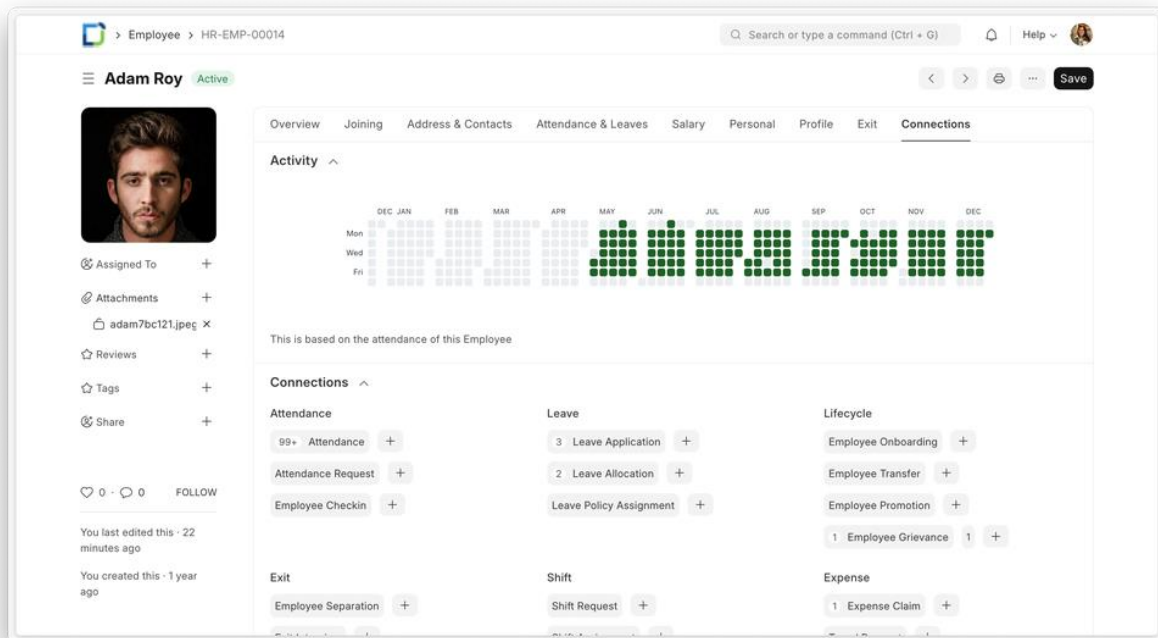


# DellSuite HR

DellSuite HR is an open Source, modern, and easy-to-use HR and Payroll Software for all organizations. It has everything you need to drive excellence within the company. It is a complete HRMS solution with over 13 different modules right from Employee Management, Onboarding, Leaves, to Payroll, Taxation, and more!



## Why DellSuite HR

Businesses often struggle with scattered HR processes, manual payroll calculations, disconnected employee records, and time-consuming approvals.

- DellSuite HR brings everything under one roof so HR teams can focus on people, not paperwork.
- Built for organizations that need a flexible and cost-effective solution, DellSuite HR eliminates inefficiencies, ensures compliance, and gives employees a seamless experience.

- Whether you are managing a handful of employees or scaling to thousands, it helps you stay organized without getting bogged down in administrative overhead.

## Key Features

- **Employee Lifecycle:** From onboarding employees, managing promotions and transfers, all the way to documenting feedback with exit interviews, make life easier for employees throughout their life cycle.
- **Leave and Attendance:** Configure leave policies, pull regional holidays with a click, check-in and check-out with geolocation capturing, track leave balances and attendance with reports.
- **Expense Claims and Advances:** Manage employee advances, claim expenses, configure multi-level approval workflows, all this with seamless integration with DellSuite accounting.
- **Performance Management:** Track goals, align goals with key result areas (KRAs), enable employees to evaluate themselves, make managing appraisal cycles easy.
- **Payroll & Taxation:** Create salary structures, configure income tax slabs, run standard payroll, accommodate additional salaries and off cycle payments, view income breakup on salary slips and so much more.

And more.

## Under the Hood

- DellSuite Framework: A full-stack web application framework written in Python and JavaScript. The framework provides a robust foundation for building web applications, including a database abstraction layer, user authentication, and a REST API.
- DellSuite UI: A Vue-based UI library, to provide a modern user interface. The DellSuite UI library provides a variety of components that can be used to build single-page applications on top of the DellSuite Framework.

# Organization Management

# Employee

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

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

To access the Employee master, go to:

Home > Human Resources > Employee

## 1. Prerequisites

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

- Company

## 2. How to create an Employee

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

As shown below, all the mandatory fields are marked with red asterisks.



> Employee > new-employee-2

Q Search or type a command (Ctrl + G)

Help

A

New Employee

Not Saved

Save

Overview

Joining

Address & Contacts

Attendance & Leaves

Salary

Personal

Profile

Exit

Series \*  
HR-EMP-

Gender \*  
Female

Date of Joining \*  
01-08-2022

First Name \*  
Olivia

Date of Birth \*  
08-12-1998

Status \*  
Active

Middle Name

Salutation  
Miss

Last Name  
Robert

Full Name  
Olivia Robert

User Details

Company Details

Company \*  
Frappe

Designation  
Engineer

Branch  
Mumbai

Department  
Research & Development

Reports to  
HR-EMP-00005

Grade  
L1

### 3. Features

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

## Employment Type

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

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

To access the Employment Type, go to:

Home > Human Resources > Employee > Employment Type

# 1. How to create an Employment Type

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

The screenshot shows the 'Employment Type' list in the DellSuite HR system. The interface includes a top navigation bar with a search bar and a '+ Add Employment Type' button. The left sidebar contains filter options for 'Assigned To' and 'Created By', and a 'Tags' section. The main table displays 8 rows of employment types, each with a checkbox, a heart icon, the name, the employment type, and a 'Last Modified On' date (all 2 M).

Name	Employment Type	Name	Last Modified On
<input type="checkbox"/> <input type="heart"/> Name	Name	Name	8 of 8
<input type="checkbox"/> <input type="heart"/> Apprentice	Apprentice	Apprentice	- 2 M 0
<input type="checkbox"/> <input type="heart"/> Intern	Intern	Intern	- 2 M 0
<input type="checkbox"/> <input type="heart"/> Piecework	Piecework	Piecework	- 2 M 0
<input type="checkbox"/> <input type="heart"/> Commission	Commission	Commission	- 2 M 0
<input type="checkbox"/> <input type="heart"/> Contract	Contract	Contract	- 2 M 0
<input type="checkbox"/> <input type="heart"/> Probation	Probation	Probation	- 2 M 0
<input type="checkbox"/> <input type="heart"/> Part-time	Part-time	Part-time	- 2 M 0
<input type="checkbox"/> <input type="heart"/> Full-time	Full-time	Full-time	- 2 M 0

The Employment Type can be linked to the [Employee](#) master.

## Branch

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

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

To access Branch, go to:

Home > Human Resources > Employee > Branch

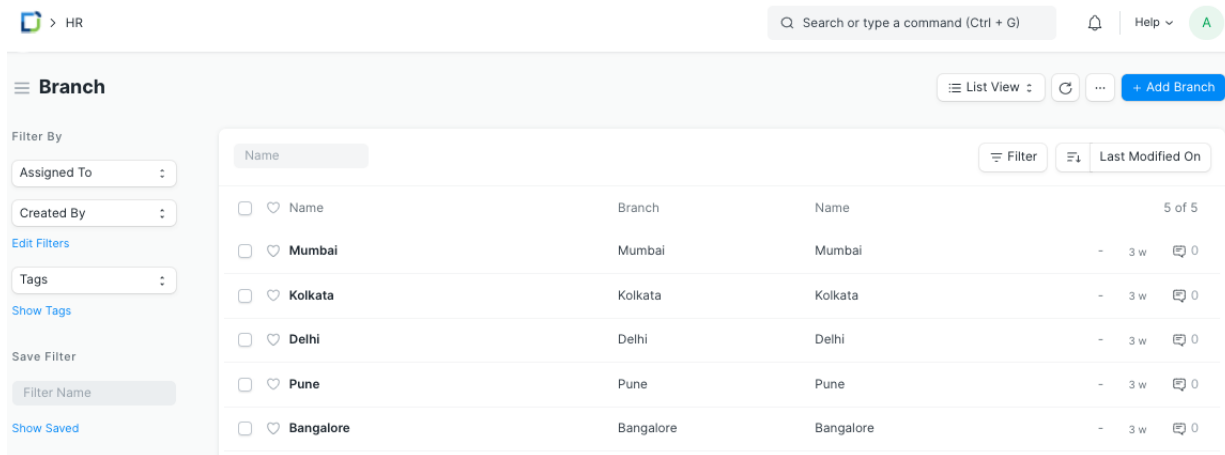
## 1. Prerequisites

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

- Company

## 2. How to create a Branch

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



You can link the Branch to the Employee master.

## Department

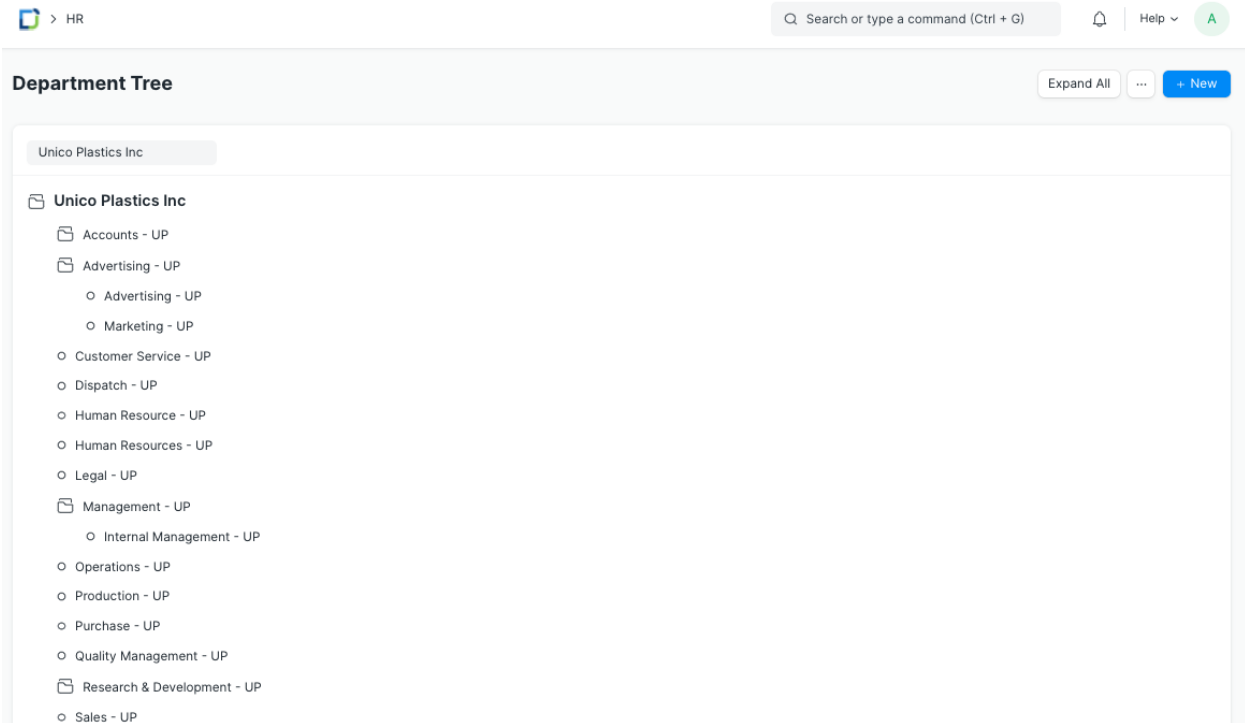
A Department is a specialized functional area or a division within an organization.

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

To access Department, go to:

Home > Human Resources > Employee > Department

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



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

## 1. Prerequisites

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

- Company

## 2. How to create a Department

1. Go to the Department list, click on New.
2. Enter Department name.
3. Select Company name.

4. Select Leave Block List (optional) applicable for this department.
5. Save.

HR > Department > Research & Development - UP

Search or type a command (Ctrl + G)

Help

Research & Development - UP

Enabled

< > Print ... Save

Assigned To  
+  
Attachments  
Attach File +  
Reviews  
+  
Shared With  
+  
Tags  
Add a tag ...

Department \*  
Research & Development

Company \*  
Unico Plastics Inc

Parent Department  
All Departments

☒ Is Group  
☐ Disabled

Payroll Cost Center

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

## 3. Features

### 3.1 Leave and Expense Approvers

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

HR > Department > Research & Development - UP

Search or type a command (Ctrl + G)

Help

Research & Development - UP

Enabled

< > Print ... Save

0 · 0 FOLLOW

You edited this just now

You created this 1 month ago

**Approvers**

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

Leave Approver

No.	Approver	
1	albert@erpnext.com	Edit

Add Row

Expense Approver

No.	Approver	
1	bruce@erpnext.com	Edit

Add Row

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

## Designation

Designations are the official job titles given to employees.

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


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

To access Designation, go to:

Home > Human Resources > Employee > Designation

### 1. How to create a Designation

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


> HR > Designation > Software Developer

Help ▾
A

≡

Software Developer

<

>

🖨

⋮

Save

👤 Assigned To

+

📎 Attachments

Attach File +

☆ Reviews

+

👥 Shared With

+

🏷 Tags

Add a tag ...

♥ 0 · 0

FOLLOW

You edited this

2 days ago

You created this

1 month ago

Description

Software developers are the creative minds behind the software programs, and they have the technical skills to build those programs or to oversee their creations.

Required Skills

Skills

<input type="checkbox"/>	No.	Skill	
<input type="checkbox"/>	1	Logical	<a href="#">Edit</a>
<input type="checkbox"/>	2	Analytical	<a href="#">Edit</a>
<input type="checkbox"/>	3	Computer programming and coding	<a href="#">Edit</a>
<input type="checkbox"/>	4	Software testing and debugging	<a href="#">Edit</a>
<input type="checkbox"/>	5	Creativity	<a href="#">Edit</a>

Add Row

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

# Employee Grade

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

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

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

To access Employee Grade, go to:

Home > Human Resources > Employee > Employee Grade

## 1. Prerequisites

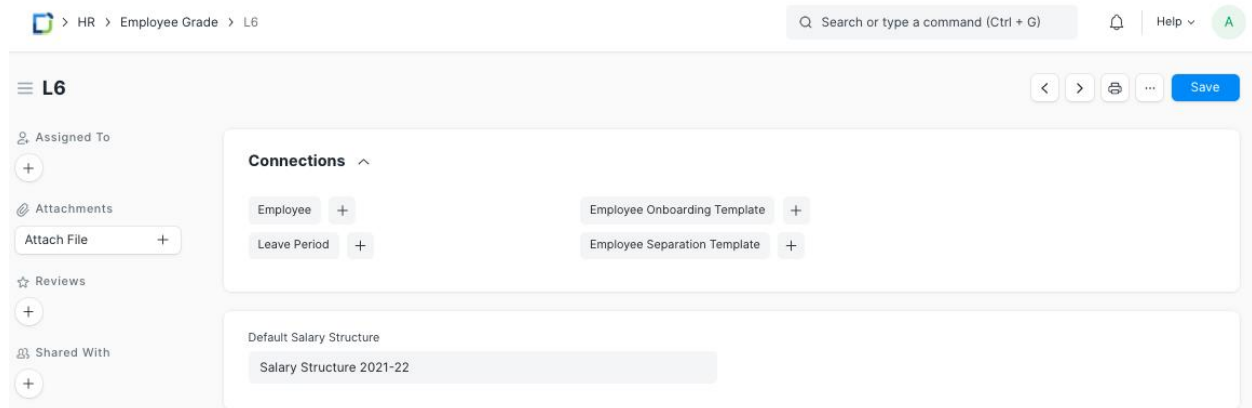
Before creating an Employee Grade, it is advisable you create the following documents:

- [Leave Policy](#)
- [Salary Structure](#)

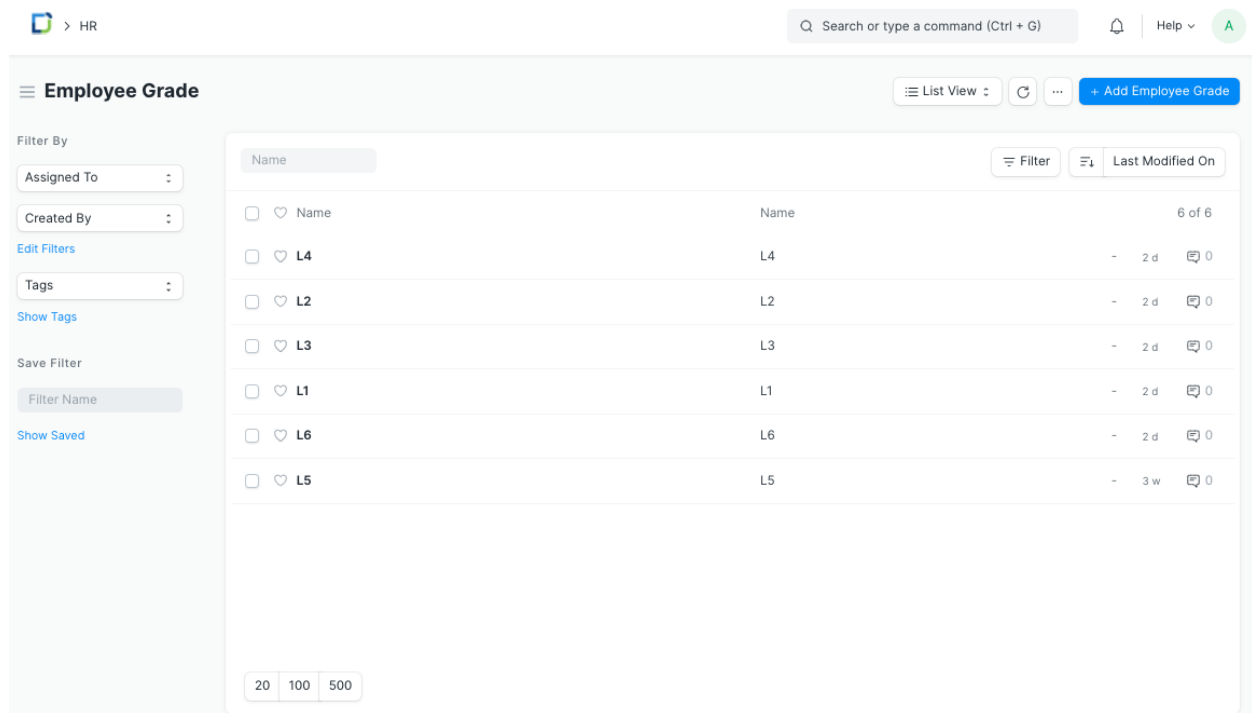
## 2. How to create an Employee Grade

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





Shown below are the different Employee Grades created.



You also can access [Employee](#), [Leave Period](#), [Employee Onboarding Template](#) and [Employee Separation Template](#).

## Employee Group

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

To access Employee Group, go to:

Home > Human Resources > Employee > Employee Group

## 1. Prerequisites

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

- Employee

## 2. How to create an Employee Group

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

The screenshot displays the 'Consultants' page in a web application. The page has a sidebar on the left with navigation options: 'Assigned To', 'Attachments', 'Reviews', 'Shared With', and 'Tags'. The main content area shows a table titled 'Employee' with columns for 'No.', 'Employee', and 'Employee Name'. There are two rows of data: Albert (HR-EMP-00001) and Michelle (HR-EMP-00002). Each row has an 'Edit' button. At the bottom of the table is an 'Add Row' button. The page also features a search bar at the top right and a 'Save' button at the bottom right.

No.	Employee	Employee Name	
1	HR-EMP-00001	Albert	Edit
2	HR-EMP-00002	Michelle	Edit

## 3. Features

### 3.1 Service Level Agreement

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

## Employee Health Insurance

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

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

To access Health Insurance Provider document, go to:

Home > Human Resources > Employee > Employee Health Insurance

### 1. How to create an Employee Health Insurance

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

HR

Search or type a command (Ctrl + G)

Help

Employee Health Insurance

List View

+ Add Employee Health Insurance

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

Filter Name

Show Saved

Name

Health Insurance N

Filter

Last Modified On

<input type="checkbox"/>	Health Insurance Name	Name	1 of 1
<input type="checkbox"/>	Star Health Insurance Provider	Star Health Insurance Provider	- 1 w 0

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

HR > Employee > HR-EMP-00001

Search or type a command (Ctrl + G)

Help

Albert Einstein

Active

< > Print ... Save

Health Insurance

Health Insurance Provider

Star Health Insurance Provider

Health Insurance No

AD123453

# Organizational Chart

An organizational chart shows the organizational structure by depicting connections between different employees with their designation, image, and name. In large organizations where it's difficult to remember names, people can interact with the org chart and know the hierarchy through faces and other info.

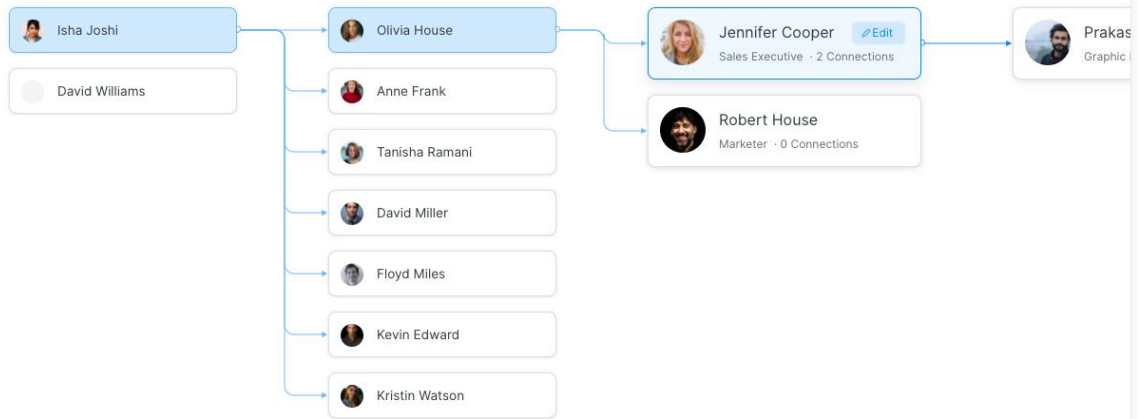
To access Employee Grade, go to:

Home > Human Resources > Employee > Organizational Chart

- The org chart is created based on the "Reports To" field in Employee master.
- The employees that don't report to anyone are shown in the first level.
- The chart expands horizontally on the desktop view and vertically on mobile.
- Each node has details like the Employee Name, Image, Designation, and the total number of connections.
- The connections are the total number of descendants a particular node has till the end of the hierarchy.
- The edit button in every node navigates to the Employee Master.
- As you navigate through the chart, the active hierarchy is highlighted.
- You can use the Company filter to check the org chart for individual companies.

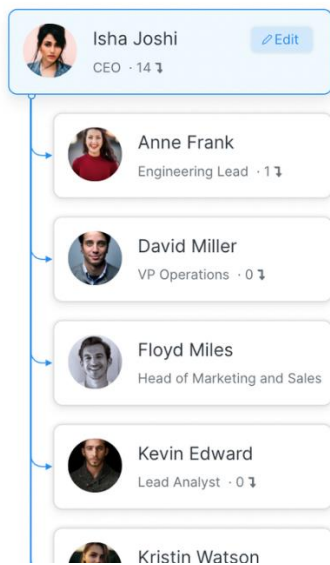
## Organizational Chart

Frappe



## Organizational Chart

Frappe



# Attendance

# Attendance

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

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

To access Attendance, go to:

Home > Human Resources > Attendance

## 1. Prerequisites

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

- Employee
- Shift Type

## 2. How to create an Attendance

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



HR > Attendance > HR-ATT-2021-00039

Search or type a command (Ctrl + G)

Help

Albert Einstein

Draft

< > Print ... Submit

Shared With

+

Tags

Add a tag ...

0 · 0

FOLLOW

You edited this  
1 minute ago

You created this  
1 minute ago

Employee \*

HR-EMP-00001

Employee Name

Albert Einstein

Status \*

Present

Attendance Date \*

19-05-2021

Company \*

Unico Plastics Inc

Department

Research & Development - UP

Details

Shift

Day

☐ Late Entry

☐ Early Exit

Note: Attendance cannot be marked for future dates.

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

You can easily set attendance for Employees using the [Employee Attendance Tool](#).

You can also bulk upload attendance using the [Upload Attendance](#).

## 3. Features

### 3.1 Marking Unmarked Attendance

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

#### How to Mark Attendance

1. Go to the Attendance list.
2. Click on the Mark Attendance button.
3. A dialog will appear.

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

## 4. Related Topics

1. [Employee Attendance Tool](#)
2. [Shift Management](#)
3. [Auto Attendance](#)
4. [Upload Attendance](#)
5. [Attendance Request](#)

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

## Employee Attendance Tool

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

To access the Employee Attendance Tool, go to:

Home > Human Resources > Attendance > Employee Attendance Tool

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

## 1. Prerequisites

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

- [Employee](#)
- [Department](#)
- [Branch](#)

## 2. How to mark attendance using Employee Attendance Tool

1. Enter the Date.
2. Select the Department and Branch (optional).
3. Select the Employees.
4. Mark Present, Absent, or Half Day as required.
5. You can also select the shift and mark employees with Late Entry and Early Exit from this view.
6. The Marked Attendance table below the tool will show you all the employees you have marked attendance for along with their attendance status. You can use column filters to search for a particular employee or employees with a particular status from this table.

Employee Lifecycle > Employee Attendance Tool

Search or type a command (Ctrl + G)

Help

A

Employee Attendance Tool

Not Saved

Mark Attendance

Date

02-03-2023

Filters

Set filters to fetch employees

Select Employees

Unmarked Attendance

Select AllUnselect All

☐ HR-EMP-00017 : Mike Ross

☐ HR-EMP-00010 : Prachi S

☐ HR-EMP-00015 : Praveen Saini

☐ HR-EMP-00007 : Ram

☐ HR-EMP-00011 : Ram

☐ HR-EMP-00012 : test

☐ HR-EMP-00013 : Test WH

Set Attendance Details

Set attendance details for the employees select above

Status \*

Shift

☐ Late Entry

☐ Early Exit

Marked Attendance

Employee	Status

Note: Attendance cannot be marked for future dates.

Once the attendance is marked using the Employee Attendance Tool, the employee attendance is saved in the Attendance record as shown:

[Mark Attendance](#)
[List View](#)
[Refresh](#)
[More](#)
[+ Add Attendance](#)

Filter Name

ID	Employee	Employee Name	Status		Filter		Filter	Last Updated On
Leave Type								
<input type="checkbox"/>	<input type="checkbox"/>	Employee Name	Status	Attendance Date	ID	20 of 511		
<input type="checkbox"/>	<input type="checkbox"/>	Mohan Rai	Present	11-04-2023	HR-ATT-2023-00541	-	7 m	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Mohan Rai	Present	10-04-2023	HR-ATT-2023-00540	-	7 m	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Mohan Rai	Present	07-04-2023	HR-ATT-2023-00539	-	7 m	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Mohan Rai	Present	06-04-2023	HR-ATT-2023-00538	-	7 m	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Mohan Rai	Present	05-04-2023	HR-ATT-2023-00537	-	7 m	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Mohan Rai	Present	04-04-2023	HR-ATT-2023-00536	-	7 m	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Mohan Rai	Present	03-04-2023	HR-ATT-2023-00535	-	7 m	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Mohan Rai	On Leave	02-05-2023	HR-ATT-2023-00534	-	8 h	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Rucha Mahabal	Present	25-05-2023	HR-ATT-2023-00509	-	1 w	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Rucha Mahabal	On Leave	04-05-2023	HR-ATT-2023-00508	-	1 w	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Kristin Watson	On Leave	04-05-2023	HR-ATT-2023-00507	-	1 w	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Rucha Mahabal	Present	25-05-2023	HR-ATT-2023-00506	-	1 w	<input type="checkbox"/>

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

## Attendance Request

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

To access Attendance Request, go to:

Home > Human Resources > Attendance > Attendance Request

## 1. Prerequisites

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

- Employee

## 2. How to create an Attendance Request

1. Go to Attendance Request list, click on New.
2. Select Employee who wants to submit the Attendance Request.
3. Select From Date and To Date of Attendance Request.
4. You can enable "Include Holidays" if you want to mark attendance for holidays in between these dates too. This feature was introduced v15 onwards.
5. Select Reason and enter Explanation (optional).

## 6. Save and Submit.

HR > Attendance Request > new-attendance-request-1

Search or type a command (Ctrl + G) | Help | A

### New Attendance Request Not Saved

Save

Employee \*

HR-EMP-00003

Employee Name

Nabin Baran Hait

Department

Customer Service - UP

Company \*

Unico Plastics Inc

From Date \*

05-05-2021

To Date \*

07-05-2021

☒ Half Day

Half Day Date \*

06-05-2021

**Reason**

Reason \*

Work From Home

Explanation

was on-site

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

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

HR

Search or type a command (Ctrl + G) | Help | A

### Attendance

Mark Attendance | List View | + Add Attendance

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

Filter Name

Show Saved

Name	Employee	Employee Name	Status	Leave Type	1 filter	Last Modified On
<input type="checkbox"/> Employee Name		Status	Attendance Date	Name	3 of 3	
<input type="checkbox"/> Nabin Baran Hait		Work From Ho...	07-05-2021	HR-ATT-2021-00042	- now 0	
<input type="checkbox"/> Nabin Baran Hait		Half D...	06-05-2021	HR-ATT-2021-00041	- now 0	
<input type="checkbox"/> Nabin Baran Hait		Work From Ho...	05-05-2021	HR-ATT-2021-00040	- now 0	

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

The screenshot shows a user profile for 'Nabin Baran Hait' with a 'Work From Home' status. The 'Connections' section lists various links, including 'Employee Checkin'. The 'Attendance Request' field is highlighted with a red box, showing the request ID 'HR-ARQ-21-05-00002'.

Employee *	Attendance Date *
HR-EMP-00003	05-05-2021

Employee Name	Company *
Nabin Baran Hait	Unico Plastics Inc

Status *	Department
Work From Home	Customer Service - UP

Attendance Request
HR-ARQ-21-05-00002

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

The screenshot shows the 'Attendance' page with a list of attendance records. The 'Status' column shows 'Cancel...' for all three records.

Name	Employee	Employee Name	Status	Leave Type	1 filter	Last Modified On
<input type="checkbox"/> Employee Name		Status	Attendance Date	Name	3 of 3	
<input type="checkbox"/> Nabin Baran Hait		Cancel...	06-05-2021	HR-ATT-2021-00041	- now	0
<input type="checkbox"/> Nabin Baran Hait		Cancel...	07-05-2021	HR-ATT-2021-00042	- 1 m	0
<input type="checkbox"/> Nabin Baran Hait		Cancel...	05-05-2021	HR-ATT-2021-00040	- 2 m	0

## 3. Features

### 3.1 Overwrite an existing Attendance record



Consider a scenario where the auto-attendance tool marked an employee as Absent. If the employee wants to rectify their attendance, they can raise a request. On submission, the Attendance record will be updated:

The screenshot displays a user interface for Kristin Watson's attendance record. The top navigation bar shows the path: HR > Attendance > HR-ATT-2023-00501. A search bar and a help icon are also present. The main header identifies the user as Kristin Watson, with a 'Work From Home' tag. On the left, there are tags, a follow button, and activity logs indicating recent edits and creations. The main content area is divided into sections: 'Status' (Work From Home), 'Department' (Research & Development), and 'Attendance Request' (HR-ARQ-23-05-00011). Below these, a 'Details' section contains checkboxes for 'Late Entry' and 'Early Exit'. A 'Add a comment' section with a text area and a 'Comment' button is also visible. At the bottom, a 'New Email' button and a notification box stating 'Administrator changed the status from Absent to Work From Home via Attendance Request - 1 minute ago' are shown.

The submission can be controlled via workflows to undergo approvals.

### 3.2 Request for Attendance in Bulk

Employees can also request for attendance for an entire month or week. On submission, attendance marking is skipped for holidays or leave days.

You can enable "Include Holidays" if you want to mark attendance for holidays too.

Attendance warnings are shown on the request dashboard for the same:

## 4. Related Topics

1. Employee Attendance Tool
2. Shift Management
3. Auto Attendance

4. [Upload Attendance](#)
5. [Attendance](#)

## Upload Attendance

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

To upload the attendance go to:

Home > Human Resources > Attendance > Upload Attendance

### 1. Prerequisites

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

- [Employee](#)

### 2. How to upload attendance in bulk

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

Attendance (12)							
Notes:							
Please do not change the template headings							
Status should be one of these values: Present, Absent, On Leave, Half Day							
If you are overwriting existing attendance records, 'ID' column mandatory							
ID	Employee	Employee Name	Date	Status	Leave Type	Company	Naming Series
	HR-EMP-00008	Jill Paul	2019-08-01			Unico Plastics Inc.	HR-ATT-YYYY-
	HR-EMP-00001	George Smith	2019-08-01			Unico Plastics Inc.	HR-ATT-YYYY-
	HR-EMP-00002	Michelle Alva	2019-08-01			Unico Plastics Inc.	HR-ATT-YYYY-
	HR-EMP-00004	Kim John	2019-08-01			Unico Plastics Inc.	HR-ATT-YYYY-

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

5. Upload the saved file.

The screenshot shows a web application interface for 'Human Resources'. At the top, there is a navigation bar with a search bar containing the text 'Search or type a command (Ctrl + G)'. To the right of the search bar are links for 'Settings', 'Help', and a red notification badge with the number '23'. Below the navigation bar, the main heading is 'Upload Attendance' followed by a status indicator 'Not Saved'. The interface is divided into two main sections: 'DOWNLOAD TEMPLATE' and 'IMPORT ATTENDANCE'. The 'DOWNLOAD TEMPLATE' section contains two date pickers: 'Attendance From Date' with the value '01-08-2019' and 'Attendance To Date' with the value '31-08-2019'. Below these pickers is a 'Get Template' button. The 'IMPORT ATTENDANCE' section features a large rectangular area with the instruction: 'Drag and drop files, [browse](#), choose an [uploaded file](#) or attach a [web link](#)'.

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

### 3. Related Topics

1. [Employee Attendance Tool](#)
2. [Shift Management](#)
3. [Auto Attendance](#)
4. [Attendance Request](#)
5. [Attendance](#)

## Employee Check-in

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

# 1. Prerequisites

To create an Employee Checkin, you need to first create:

- Employee

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

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

## 2. How to create an Employee Checkin

### 2.1 Creating logs manually

To create a new Employee Checkin go to:

Human Resources > Attendance > Employee Checkin

1. Click on New.
2. Select the Employee.
3. Set the date and time for the log.
4. Set Log Type as IN/OUT.
5. Save.
6. If you have set up shifts and shift assignments, the Employee Checkin will set the appropriate shift in which the timestamp falls after saving. If you have forgotten to assign a shift, causing the system to pick up the wrong one, you can re-fetch it by clicking on the 'Fetch Shift' button, as long as attendance has not already been marked for the same.
7. You can enable *Skip Auto Attendance* to skip that record while marking attendance.

8. You can also capture the location from where the employee has checked in or the Biometric Device ID.

HR > Employee Checkin > EMP-CKIN-08-2024-000002

Q Search or type a command (⌘ + G)

Help A

Steve Merkel Lews

Fetch Shift < > ⌵ ⋮ Save

Assigned To +

Attachments +

Tags +

Share +

0 · 0 · 0 FOLLOW

You last edited this · just now

You created this · 1 week ago

Employee \*  
HR-EMP-00003

Employee Name  
Steve Merkel Lews

Log Type  
IN

Shift  
General

Location

Latitude  
50.0000000

Time \*  
04-07-2024 16:59:02

Asia/Kolkata

Location / Device ID  
Mumbai-123

☐ Skip Auto Attendance

Attendance Marked  
HR-ATT-2024-00171

Longitude  
24.9990000

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

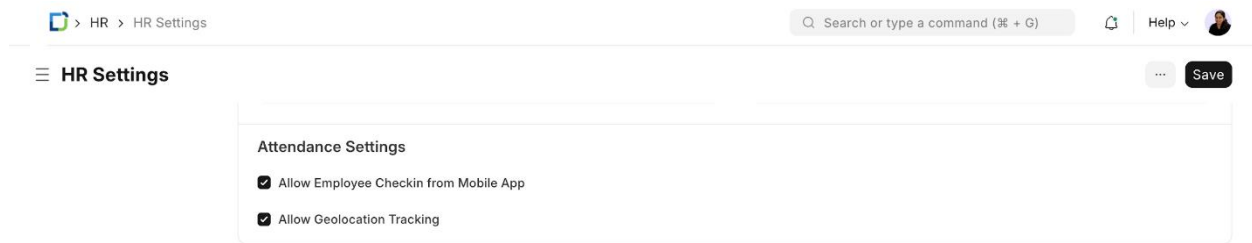
## 2.2 Integrating DellSuite with Biometric Devices

If you are using a Biometric Device to log employee check-ins and check-outs you can use it to create records in DellSuite.

## 3. Features

### 3.1 Geolocation Tracking

You can also track geolocation in employee checkins. To enable this, go to HR Settings and enable "Allow Geolocation Tracking"



You can then click on the "Fetch Geolocation" button in the check-in form to fetch your current location. If geolocation tracking has been enabled, it will be automatically captured while checking in from the mobile app too

### 3.2 Checkin log indicator

Employee checkins fetch appropriate shift while saving based on the time of checkin or checkout log. If there is no active shift associated for the time of log, the employee checkin log is marked as Off-Shift indicating the lack of associated shift. Since auto-attendance works based on shift, these checkin logs are excluded while marking auto-attendance.

## Auto Attendance

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

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

## Steps to Set Up Auto Attendance

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

### 1. Define Shift Type with Auto Attendance Enabled

You will have to define a Shift Type with Auto Attendance enabled. Details can be found [here](#).

## 2. Assign these shifts to employees

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

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

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

## 3. Setup Attendance Device ID field in Employee

Biometric systems usually have their own IDs for employees. But, the Employee Checkin in DellSuite HR needs to be mapped to an employee.

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

## 4. Import or sync Employee Checkins

Once you are done with the above steps you can import/sync the [Employee Checkin](#) and start generating attendance automatically.



Please refer to this article to know more about populating Employee Checkins from an external system: [Integrating DellSuite HR with Biometric Attendance Devices](#)

## Frequently Asked Questions

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

Consider a Morning Shift:

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

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

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

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

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

Once the "Last Sync of Checkin" passes the shift's actual end time, all the employee checkins for that shift are processed for marking attendance.

For eg: Consider a Morning Shift:

- Start Time: 08:00:00
- End Time: 11:30:00

- Begin check-in before shift start time (in minutes): 60
- Allow check-out after shift end time (in minutes): 60

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

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

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

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

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

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

Holiday List for an employee is determined as follows:

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

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

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

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

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

It has been explained in detail over [here](#).

## **Integrating DellSuiteWith Biometric Attendance Devices**

### **Background**

The Attendance punch logs from the biometric device are check-in and check-out logs of an employee. DellSuite has a provision to store these logs in a document called Employee Checkin.

Attendance can then be marked based on the [Employee Checkin](#) records and the [Shift Type](#) of the employee by using [Auto Attendance](#)

Hence, integrating your Biometric Device (*or any access control system that collects IN/OUT logs*), can be done using the following steps:

### **1. Setting up Auto Attendance to mark attendance from the Employee Checkin**

Before you import/sync employees' Check-in and Check-out logs into your DellSuite system, you will have to set up the employees and their shifts to be able to generate attendance using the Auto Attendance feature in DellSuite.

Please refer to the following link to set up Auto Attendance: [Set up Auto Attendance](#)

Once you have set up the employee master and assigned shifts to the employees, you are now ready to proceed to the next step.

## **2. Populating the Biometric Punch Logs into DellSuite's Employee Checkin**

Depending on your biometric system and its features, there can be a lot of ways you can populate the Punch logs into DellSuite:

### **1. Use the Data Import Tool:**

- The simplest possible solution (in terms of implementation complexity) would be to generate an Excel/CSV of the Check-in/Check-out and use the built-in data import tool in DellSuite HR to periodically import the logs to your Employee Checkin Document
- Please refer to [Documentation on Data Import Tool](#) for more on how to do this.

### **2. API Integration:**

- You can automate the process of syncing the Biometric Punch Logs by integrating it with the available API in DellSuite.
- This method requires some technical knowledge and you should probably get in touch with your DellSuite implementor or Biometric system vendor.
- Steps:
  1. You will first need to create a [user](#) in your DellSuite instance that would be used for creating logs since this API method requires login. Make sure this user has all the required permissions to create Employee Checkin.
  2. [Generate API Key and API Secret](#) for the user which will be used for authentication.

3. Make sure you have set the Attendance Device ID (Biometric/RF tag ID) for the employees based on your Biometric Device.

4. The API implementation details can be found here and the API can be accessed at:

`/api/method/hrms.hr.doctype.employee_checkin.employee_checkin.add_log_based_on_employee_field.`

5. You can write a script to send a POST request to the API. This endpoint finds the relevant Employee using the employee field value and creates an Employee Checkin. Details of the API endpoint:

- URL:

`/api/method/hrms.hr.doctype.employee_checkin.employee_checkin.add_log_based_on_employee_field`

- Method: POST

- Params:

- `employee_field_value`: The value to look for in the employee field. This will be the Attendance Device ID found in your biometric logs and also set in the employee record.
- `timestamp`: The timestamp of the Log. Currently expected in the following format as a string: '2022-04-08 10:48:08.000000'
- `device_id`: (optional) Location / Device ID. A short string is expected.
- `log_type`: (optional) Direction of the punch if available (IN/OUT).
- `skip_auto_attendance`: (optional) Skip auto attendance field will be set for this log (0/1)
- `employee_fieldname`: (Default: `attendance_device_id`) Name of the field in Employee DocType based on which employee lookup will happen.

- latitude: (optional) Latitude of the shift location if shift location is assigned.
    - longitude: (optional) Longitude of the shift location if shift location is assigned.
  - Response: Returns an Employee Checkin document object which was inserted.
3. Set up a python script on your computer to integrate ZKTeco or similar devices:
- This method works only for ZKTeco or similar devices that use the ZKProtocol to communicate over TCP/IP.
  - This script is available at: [github:DellSuite/biometric-attendance-sync-tool](https://github.com/DellSuite/biometric-attendance-sync-tool).
  - Please follow the instructions given on the script page to set it up on your computer.
  - This Script pulls biometric logs from a supported device and uses the API mentioned in the above step to push the data into DellSuite.

## Frequently Asked Questions

### 1. How do I select a Biometric Device which is compatible with DellSuite?

If you are using method 1 or 2, you don't need to worry about compatibility.

However, for the third method, the push biometric app internally uses a script that is compatible with the devices listed over [here](#). Typically, any ZKTeco or similar device that uses the ZKProtocol to communicate over TCP/IP should work. As far as buying the device is concerned, we suggest you opt for a device trial with the vendor if possible, where the device can be tested with the sync tool, as it's dependent on multiple factors when it comes to compatibility.

### 2. How do I know which method to use for integrating my biometric device with DellSuite?

Method 1 is feasible in any situation but requires you to manually import logs periodically. Methods 2 and 3 need some monitoring and work for a one-time setup for the log syncing to be automated.

For a single location set up:

In the Push Biometric Device approach, the tool needs to be able to communicate with your biometric device via TCP/IP. So, it is usually the case that it needs to run on the same LAN Network as the biometric device. To sync these fetched logs to your DellSuite instance it uses API access. This works best when you have a single location set up.

For a multi-location set up:

In this case, we usually recommend method 2 where most biometric vendors provide services to sync the biometric device logs from multiple locations to DellSuite via API access. Method 3 (push biometric attendance tool) can also work in this case if you have some networking knowledge.

# Shift Management



# Shift Management

The Shift Management module in DellSuite HR helps you efficiently manage shifts for your employees.

Using this module you can:

1. [Set up a Shift Type.](#)
2. [Create Shift Requests.](#)
3. [View and Manage Shift Assignments.](#)
4. [Setup Attendance Device ID field in Employee master.](#)
5. [Create Employee Checkins.](#)
6. [The system then processes auto attendance if it is enabled.](#)

## Shift Type

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

To access Shift Type, go to:

Home > Human Resources > Shift Management > Shift Type

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

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

## 1. Basic Set Up

1. **Start Time:** The time of the day when this shift starts. The time is to be entered in a 24Hrs format.
2. **End Time:** The time of the day when this shift ends. The time is to be entered in a 24Hrs format.

3. **Holiday List:** The applicable holidays for this shift can be selected here. If left blank, the default holiday list from the employee master or the company document is taken into account. Attendance is not marked via the scheduler if it's a holiday.
4. **Enable Auto Attendance:** You can use this option to enable marking attendance for the employees assigned to this shift based on their Employee Checkin records.

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

## 2. Auto Attendance Settings

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

- **Determine Check-in and Check-out:** This setting determines how your check-in logs should be interpreted by the auto attendance system.
  1. **Alternating entries as IN and OUT during the same shift:** The first entry is taken as IN followed by the next entry as OUT and the following entry as IN and so on. Employee Check-in may not always have an IN/OUT log type. Not all biometric devices return Log Type for every log. For such scenarios you can use this option.
  2. **Strictly based on Log Type in Employee Checkin:** The check-in is determined as IN or OUT strictly based on the 'Log Type' in the Employee Checkin record. This should be used when the logs that are being recorded in DellSuite HR have the exact log type.
- **Working Hours Calculation Based On:** Working hours can be calculated either by including the breaks in between the shift or by excluding the breaks. This can be configured using the following options:
  1. **First Check-in and Last Check-out:**
    - Use this option when you want to include breaks or all out/in entries in your working hours.

- Selecting this option calculates the working hours by considering the first IN and last OUT Employee Checkin during the shift. The time difference between the two is considered as the actual working hours.
- In case the IN/OUT is determined by alternating entries then the first Employee Checkin is considered as IN and the last Employee Checkin is considered as OUT for the purpose of calculating working hours.

## 2. Every Valid Check-in and Check-out:

- Selecting this option excludes the time during which the Employee is checked out.
- i.e. Only the time during which the employee is checked in is calculated as working hours.
- Begin check-in before shift start time (in minutes): Often employees would check-in a few minutes before the shift start time. To consider these check-ins as part of the shift during the calculation of working hours and marking attendance, you can set up this value accordingly.
- Allow check-out after shift end time (in minutes): Often employees would check-out after the shift end time. To consider these check-outs as part of the shift during the calculation of attendance, you can set up this value accordingly.
- Mark Auto Attendance on Holidays: If enabled, auto attendance will be marked on holidays if Employee Checkins exist on that date. By default, auto attendance is skipped on holidays.
- Working Hours Threshold for Half Day: If the actual number of working hours is less than the given value in this field then the employee attendance is marked as 'Half Day'. If you never want to mark Half Day based on working hours, you should set this value to zero.
- Working Hours Threshold for Absent: If the actual number of working hours is less than the given value in this field then the employee attendance is marked as 'Absent'. If you never want to mark Absent based on working hours, you should set this value to zero.

- **Process Attendance After:** The date from which 'Auto Attendance' should start marking attendance. You should set it to a date after which you have Employee Checkin records for this shift.
- **Last Sync of Checkin:** This is the timestamp up to which Employee Checkin records have been synced. This field has to be updated by the script/person(in case of manual entry) making the Employee Checkin Records. If your logs are automatically pushed to DellSuite HR using the sync tool, this timestamp will automatically be updated for you. You should set this to a date and time up to which the Employee Checkin has been synced.
- **Automatically update Last Sync of Checkin:** In case of a single biometric device, or check-ins through the mobile app, you can enable this to let the system take care of auto updating your last sync of checkin so that no scripting or manually updating this timestamp is required.

### **3. Late Entry & Early Exit Settings for Auto Attendance**

- **Enable Late Entry Marking:** Selecting this option marks those Attendance records with Late Entry wherein the employee's In Time exceeds the permissible In Time.
- **Late Entry Grace Period:** Adds additional grace period in minutes to the Shift Start Time after which entries are marked as late.
- **Enable Early Exit Marking:** Selecting this option marks those Attendance records with Early Exit wherein the employee's Out Time falls short of the permissible Out Time.
- **Early Exit Grace Period:** Adds additional grace period in minutes to the Shift End Time before which exits are marked as early.

## **Shift Location**

Shift Location is used to map locations to Shift Assignments. It can also be used to implement geofencing by ensuring that the employee can only checkin within a certain radius of the location.

# 1. How to create a Shift Location

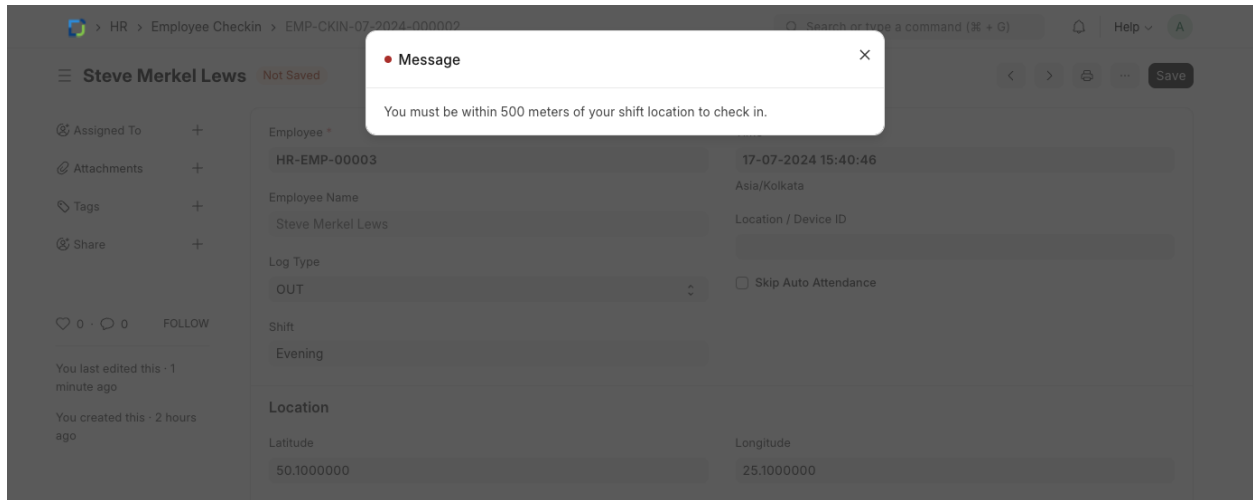
To create a new Shift Location, go to: Human Resources > Shift & Attendance > Shift Location

1. Go to the Shift Location list and click on Add Shift Location.
2. Set the Location Name.
3. If you wish to implement geofencing, you will first have to enable Allow Geolocation Tracking under HR Settings.
4. You can now set the Checkin Radius, along with the Latitude and Longitude, or click on the Fetch Geolocation button to do so automatically.
5. Save.

The screenshot displays the 'Location A' configuration page. The top navigation bar shows the breadcrumb 'HR > Shift Location > Location A'. The main content area is divided into a left sidebar and a central form. The sidebar contains links for 'Assigned To', 'Attachments', 'Tags', and 'Share', each with a plus icon. Below these are social interaction icons for 'Like' (0), 'Comment' (0), and 'Follow'. The central form has a 'Checkin Radius' field set to 500, with a subtext 'Radius within which check-in is allowed (in meters)'. To the right are 'Latitude' (50.000) and 'Longitude' (25.000) fields. A 'Fetch Geolocation' button is located below the radius field. At the bottom of the form is a map with a blue location pin. The map includes a vertical toolbar with icons for zooming, panning, and other map functions. The bottom right of the map area has a small text credit: 'Leaflet | © OpenStreetMap contributors'.

## 2. Geofencing

To implement geofencing, you will first have to assign a shift to an employee with the desired Shift Location. While checking in, if the employee is not within the Checkin Radius of the Shift Location, they will be faced with an error that will disallow them from doing so.



## Shift Request

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

### 1. Prerequisites

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

- Employee
- Shift Type

### 2. How to create a Shift Request

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

1. Go to Shift Request List, Click on New.
2. Select Employee and Shift Type.

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

The screenshot shows the 'Shift Request' form in ERPNext. The form is titled 'Robert House' and is in 'Submitted' status. It shows fields for Shift Type (Day), Company (Frappe), Employee (Robert House), Approver (rucha@erpnext.com), Employee Name (Robert House), From Date (29-11-2021), To Date (29-11-2021), and Status (Approved). The form is part of a 'Shift Request' document with ID HR-SHR-21-11-00001.

### 3. Setting Shift Request Approver

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

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



> HR > Department > Research & Development - F

Search or type a command (Ctrl + G) | Help | A

No Data

Add Row

Shift Request Approver

<input type="checkbox"/>	No.	Approver *	
<input type="checkbox"/>	1	agatha@frappe.com	Edit
<input type="checkbox"/>	2	anne@gmail.com	Edit

Add Row

When an Employee belonging to a particular department request for Shift Type, the Shift Request Approver set in that Employee's department master will be considered as his Shift Type Approvers. \*

Employee Level: Shift Request Approver can also be set in the employee master.

> HR > Employee > HR-EMP-00002

Search or type a command (Ctrl + G) | Help | A

Robert House • Active

Joining Details

Department and Grade

Approvers

Expense Approver  
rucha@erpnext.com

Shift Request Approver  
rucha@erpnext.com

Leave Approver  
agatha@frappe.com

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

## Shift Assignment

### 1. Prerequisites

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

- Employee

- Shift Type

## 2. How to create a Shift Assignment

In some organizations, shifts are assigned to employees, and in some, employees request for a shift.

In the latter case, employees can create a Shift Request. Once the Shift Request is Approved and submitted it automatically creates a Shift Assignments for an Employee.

To directly create a Shift Assignment, go to:

Home > Human Resources > Shift Management > Shift Assignment

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

The screenshot shows a web application interface for creating a Shift Assignment. At the top, there is a breadcrumb trail: Home > HR > Shift Assignment > HR-SHA-22-02-00003. A search bar and a 'Help' link are also visible. The main header shows 'Isha Joshi' with a 'Submitted' status. On the left, there are tabs for 'Assigned To', 'Attachments', 'Reviews', 'Shared With', and 'Tags'. The 'Assigned To' tab is active, showing a list of employees. The main form area contains the following fields:

Employee *	Company *
Isha Joshi	Frappe
Employee Name	Start Date *
Isha Joshi	01-01-2022
Shift Type *	End Date
Midnight Shift	
Status	Department
Active	Research & Development - F

You can also switch to a calendar view to see shift schedules of multiple employees

HR > Shift Assignment

Q

Search or type a command (Ctrl + G)

🔔

Help ▾

A

☰

Shift Assignment Calendar

Filter

⌵

Last Updated On

📅

Calendar View ▾

🔄

⋮

+ Add Shift Assignment

Calendar

Select Calendar ▾

Filter By

Assigned To ▾

Created By ▾

Edit Filters

Tags ▾

Show Tags

Save Filter

Filter Name

<

February 2022

>

🌞 Today

Month

Week

Day

SUN	MON	TUE	WED	THU	FRI	SAT
30	31	1 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	2 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	3 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	4 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	5 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p
6 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	7 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	8 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	9 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	10 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	11 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	12 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p
13 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	14 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	15 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	16 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	17 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	18 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	19 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p
20 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	21 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	22 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	23 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	24 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	25 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p	26 Amy Parsons: Norma 10a - 4p David Miller: Evening 6:30p - 10p
27 Amy Parsons: Norma 10a - 4p	28 Amy Parsons: Norma 10a - 4p	1 Amy Parsons: Norma 10a - 4p	2 Amy Parsons: Norma 10a - 4p	3 Amy Parsons: Norma 10a - 4p	4 Amy Parsons: Norma 10a - 4p	5 Amy Parsons: Norma 10a - 4p

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

## 3. Features

### 3.1 Allow Multiple Shift Assignments for Same Date

Multiple Shift Assignments on the same date for an employee can be enabled or disabled under the HR Settings.

## Shift Schedule

Shift Schedule can be used to create definitions for recurring shift assignments based on selected days and frequency.

# 1. Prerequisites

To create a Shift Schedule, this needs to be created first:

- [Shift Type](#)

## 2. How to create a Shift Schedule

To directly create a Shift Schedule, go to:

DellSuite HR > HR > Shift & Attendance > Shift Schedule

- Click on Add Shift Schedule.
- Enter the Name.
- Select the Shift Type.
- Select the Frequency.
- Select the Repeat On Days.
- Click on Save, and then Submit.

The screenshot displays the 'Shift Schedule 1' creation page in DellSuite HR. The page has a top navigation bar with a search bar and a 'Help' link. Below the navigation bar, there's a 'Shift Tools' section with icons for 'Assigned To', 'Attachments', 'Tags', and 'Share'. The main form area is divided into sections: 'Shift Schedule Assignment' with a '+' button, 'Shift Type' set to 'Morning Shift', 'Frequency' set to 'Every Week', and 'Repeat On Days' with a table showing 'Monday' and 'Wednesday' selected. Below this is a 'Comments' section with a text input field and a 'New Email' button. The 'Activity' section shows a list of actions: 'You last edited this - just now' and 'You created this - just now'. The right sidebar contains a list of actions: 'Assigned To', 'Attachments', 'Tags', and 'Share', each with a '+' button.

Shift Schedule 1 Submitted

Shift Tools: [Icons] Cancel

Shift Schedule Assignment +

Shift Type \* Morning Shift Frequency \* Every Week

Repeat On Days

Day	
Monday	[Edit]
Wednesday	[Edit]

Comments 0

Type a reply / comment

Activity + New Email

- You last edited this - just now
- You created this - just now

Assigned To +

Attachments +

Tags +

Share +

### 3. Assigning Shift Schedule

To assign a shift schedule to an employee, and to create shift assignments based on it, use [Shift Schedule Assignment](#). You can also assign shift schedules in bulk using the [Shift Assignment Tool](#).

### 4. Related Topics

1. [Shift Type](#)
2. [Shift Assignment](#)
3. [Roster](#)

## Shift Schedule Assignment

Shift Schedule Assignment can be used to assign shift schedules to employees and create repeating shift assignments based on it.

### 1. Prerequisites

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

- [Employee](#)
- [Shift Schedule](#)
- [Shift Location](#) (Optional)

### 2. How to create a Shift Schedule Assignment

To directly create a Shift Schedule Assignment, go to:

DellSuite HR > HR > Shift & Attendance > Shift Schedule Assignment

- Click on Add Shift Schedule Assignment.
- Select the Employee, Shift Schedule, and Shift Location, if any.
- Set the Shift Status. Shift Assignments will be created of this status.
- Select Enabled if you wish for shifts to continue being created automatically via the scheduler. Deselect this if you wish to stop the same.
- Set Create Shifts After. As the name suggests, shifts will be created after this date. This field will be automatically updated after shift assignments are created via the scheduler.
- Click on Save.

HR > Shift Schedule Assignment > HR-SHSA-24-12-00012

Search or type a command (R + K) | Help | A

**Akash Tom** Enabled

Shift Assignment +

**Employee Details**

Employee \* HR-EMP-00001 Company \* Frappe

Employee Name Akash Tom

**Shift Details**

Shift Schedule \* Shift Schedule 1 ☒ Enabled  
Select this if you want shift assignments to be automatically created indefinitely.

Shift Location Location A

Shift Status Active Create Shifts After 19-12-2024  
New shift assignments will be created after this date.

**Comments** 0

A Type a reply / comment

**Activity** + New Email

- You last edited this - just now
- You created this - just now

Assigned To +

Attachments +

Tags +

Share +

## 4. Related Topics

1. [Shift Type](#)
2. [Shift Assignment](#)
3. [Shift Assignment Tool](#)
4. [Roster](#)

# Shift Assignment Tool

The Shift Assignment Tool allows you to assign shifts or process shift requests in bulk.

Home > Human Resources > Shift Management > Shift Assignment Tool

## 1. Prerequisites

Before using the Shift Assignment Tool, it is advisable to create the following documents:

- [Employee](#)
- [Shift Type](#)
- [Shift Request](#)

## 2. How to use the Shift Assignment Tool

### 2.1 Assigning Shifts

1. Set Action as 'Assign Shift' and select a Company if it hasn't been appropriately selected already.
2. Select the Shift Type that you wish to assign, along with the dates on which you wish to assign it. This will cause all employees without overlapping active Shift Assignments to be loaded in the Select Employees table below.
3. You can also assign inactive shifts by setting Status as 'Inactive'. Pre-existing overlapping shifts will be ignored in this case.
4. Use Quick Filters for filtering employees based on specific fields, or add additional custom filters through Advanced Filters.
5. Select suitable employees from the Select Employees table.
6. If everything looks good, click on the Assign Shift button at the top.

## Shift Assignment Tool

Assign Shift

Action \*

Assign Shift

Company \*

Frappe

Shift Assignment Details

Shift Type \*

Night Shift

Start Date \*

23-04-2024

Status

Active

End Date

Quick Filters

Advanced Filters

Select Employees

As a result, Shift Assignments will be created for the selected employees.

## 2.2 Assigning Shift Schedules

1. Set Action as 'Assign Shift Schedule' and select a Company if it hasn't been appropriately selected already.
2. Select the Shift Schedule that you wish to assign, along with the dates between which you want to create shift assignments. This will cause all employees without overlapping enabled Shift Schedule Assignments to be loaded in the Select Employees table below. If you set the End Date, the shift schedule assignments created will be disabled. If not, the shift schedule assignment will be 'Enabled'. This means that shift assignments will continue to be created automatically via the scheduler.
3. Use Quick Filters for filtering employees based on specific fields, or add additional custom filters through Advanced Filters.



4. Select suitable employees from the Select Employees table.
5. If everything looks good, click on the Assign Shift Schedule button at the top.

Shift & Attendance > Shift Assignment Tool

Search or type a command (⌘ + K) Help

Assign Shift Schedule

Action: Assign Shift Schedule Company: Frappe

**Shift Assignment Details**

Shift Schedule: Shift Schedule 1 Start Date: 01-12-2024

Shift Location: Location A End Date:

Status: Active

When set to 'inactive', employees with conflicting active shifts will not be excluded.

Quick Filters

Advanced Filters

**Select Employees**

Employee	Employee Name	Branch	Department	Default Shift
<input type="checkbox"/>				
<input type="checkbox"/> HR-EMP-00002	Magnus Carlsen			
<input type="checkbox"/> HR-EMP-00003	Alex Honnold			
<input type="checkbox"/> HR-EMP-00004	Jim Jones			
<input type="checkbox"/> HR-EMP-00005	Feliz Navidad			

As a result, Shift Schedule Assignments and their corresponding Shift Assignments will be created for the selected employees.

## 2.3 Processing Shift Requests

1. Set Action as 'Process Shift Requests' and select a Company if it hasn't been appropriately selected already.
2. You can filter based on Shift Type or Approver. You can also set From Date and To Date to only include shift requests falling between these dates.
3. Use Quick Filters for filtering employees based on specific fields, or add additional custom filters through Advanced Filters.
4. Select suitable shift requests from the Select Shift Requests table.
5. If everything looks good, click on the Process Requests button at the top and select Approve or Reject.

Shift Assignment Tool

Process Requests

Action \*

Process Shift Requests

Company \*

Frappe

Shift Request Filters

Shift Type

From Date

Shift Requests ending before this date will be excluded.

Approver

To Date

Shift Requests starting after this date will be excluded.

Quick Filters

Advanced Filters

Select Shift Requests

<input checked="" type="checkbox"/>	Shift Request	Employee	Shift Type	From Date	To Date
<input type="checkbox"/>					
<input checked="" type="checkbox"/>	HR - SHR - 24 - 04 - 00000	HR - EMP - 00005: Joba	Night Shift	2024 - 04 - 01	
<input checked="" type="checkbox"/>	HR - SHR - 24 - 04 - 00001	HR - EMP - 00003: Steve Merke...	Evening	2024 - 04 - 23	2024 - 04 - 27
<input checked="" type="checkbox"/>	HR - SHR - 24 - 04 - 00002	HR - EMP - 00004: Jornad	Morning	2024 - 05 - 01	2024 - 05 - 31

The selected Shift Requests will then be approved or rejected, and submitted accordingly.

### 3. Related Topics

- 1. [Shift Type](#)
- 2. [Shift Assignment](#)
- 3. [Shift Request](#)
- 4. [Shift Schedule](#)
- 5. [Roster](#)

## Roster

### 1. Prerequisites

Before using the Roster, it is advisable you create the following:

- Shift Type
- Shift Assignment

## 2. How to Access the Roster

To access the roster, go to:

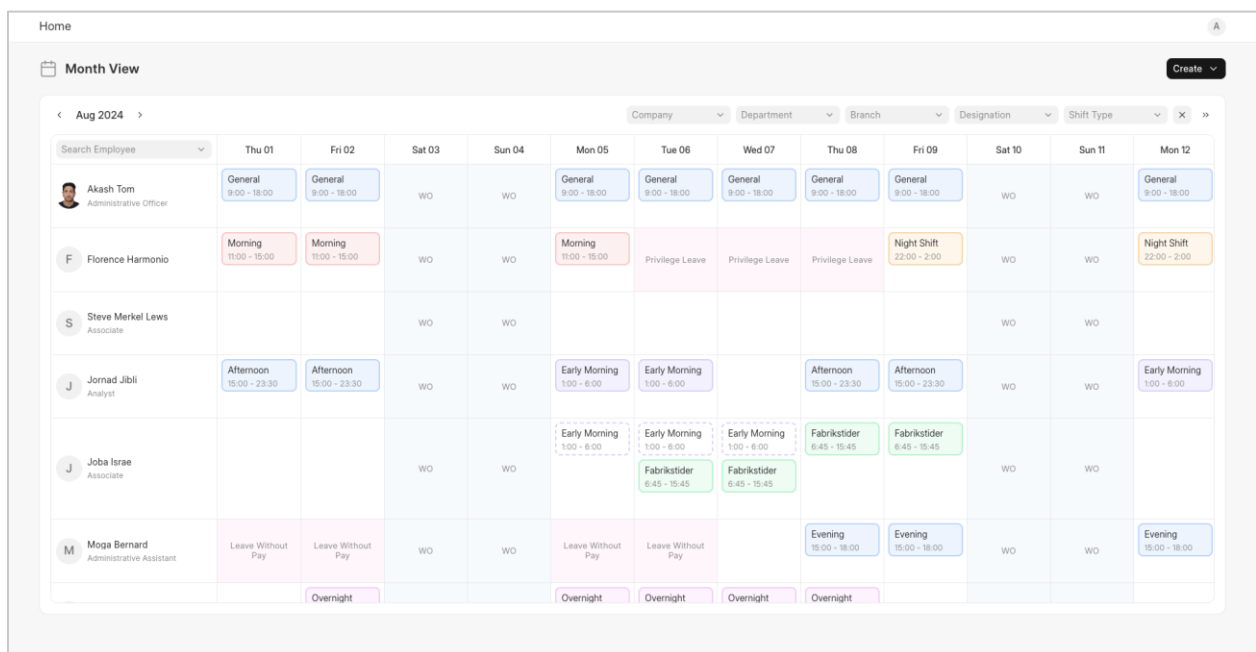
Home > Human Resources > Shift & Attendance > Roster

You can also access it directly from <https://hr/roster>. For example, if your site url is <https://DellSuiteio.DellSuite.cloud>, go to <https://DellSuiteio.DellSuite.cloud/hr/roster>.

## 3. Features

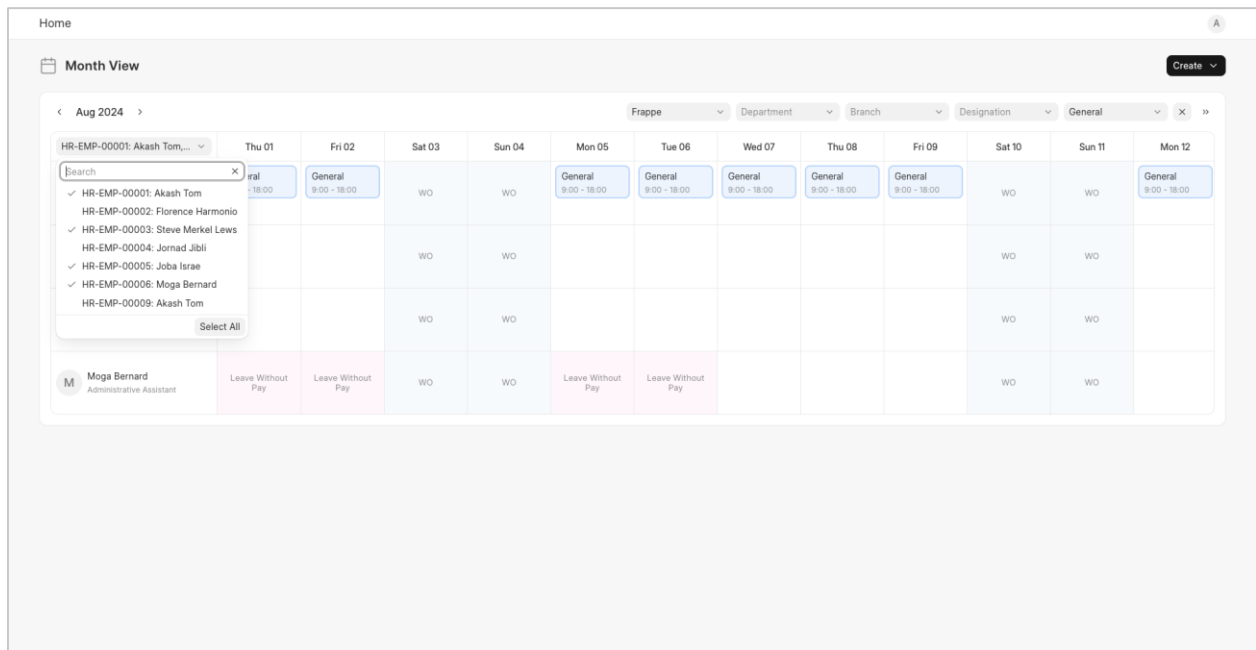
### 3.1 Calendar View

The Roster features the visualization of Employee - Shift, Leave, and Holiday mapping in an Employee vs Day of the Month representation.



## 3.2 Searching and Filtering

You can use the search bar to search for employees. You can also filter shifts by company, department, branch, designation, and shift type.

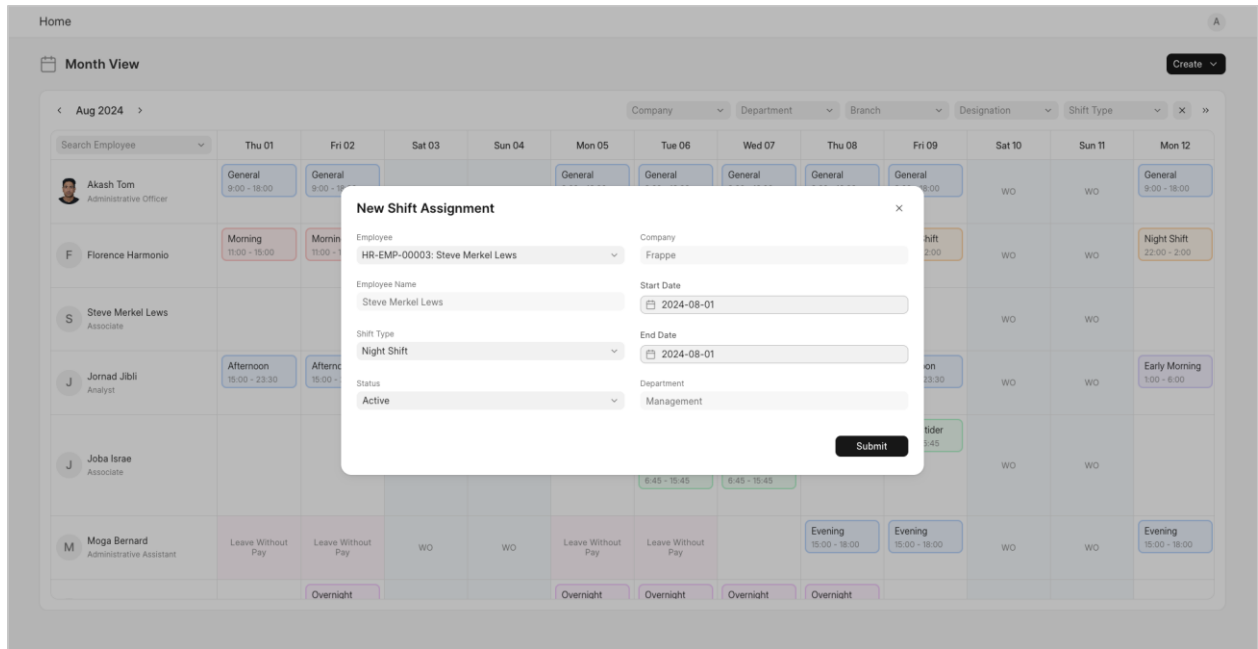


## 3.3 Creating Shifts

Click on the plus button in a cell to create a shift corresponding to that date and employee. The roster allows for two types of shifts to be created.

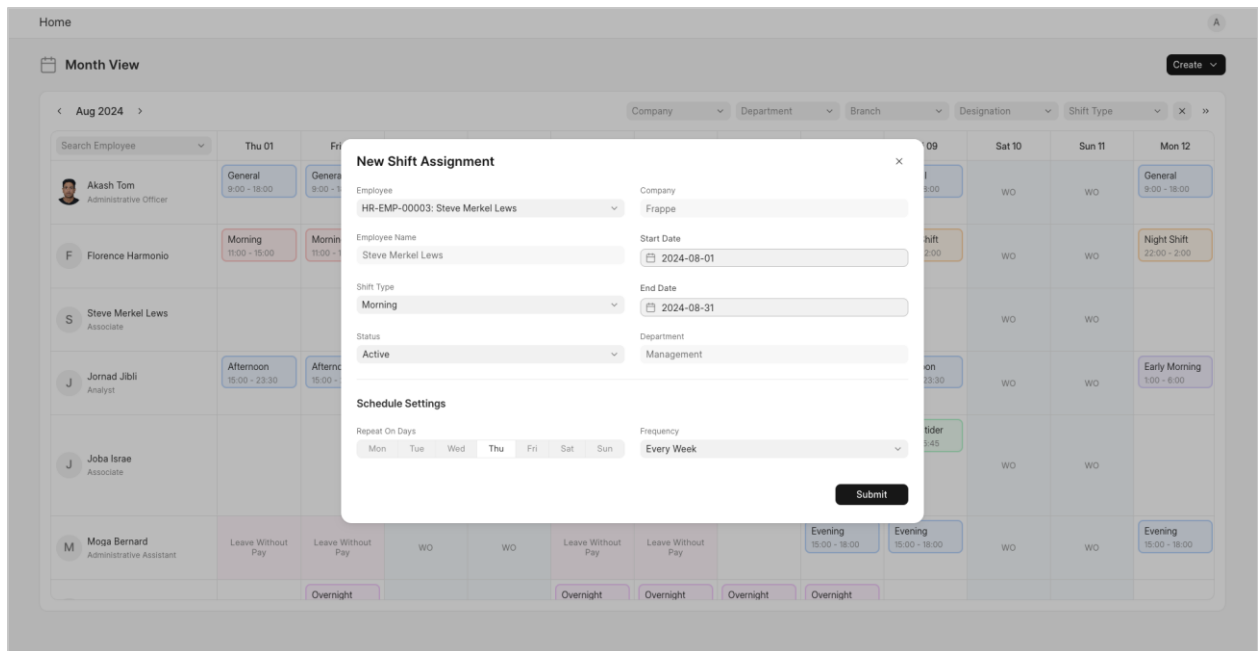
### Regular Shifts

Creating a regular shift results in the creation of a single Shift Assignment. Shifts spanning a week or less are automatically created as regular. For shifts spanning over a week, the user will have to select all days from the Repeat On Days field, under Schedule Settings, to ensure that a regular shift is created.



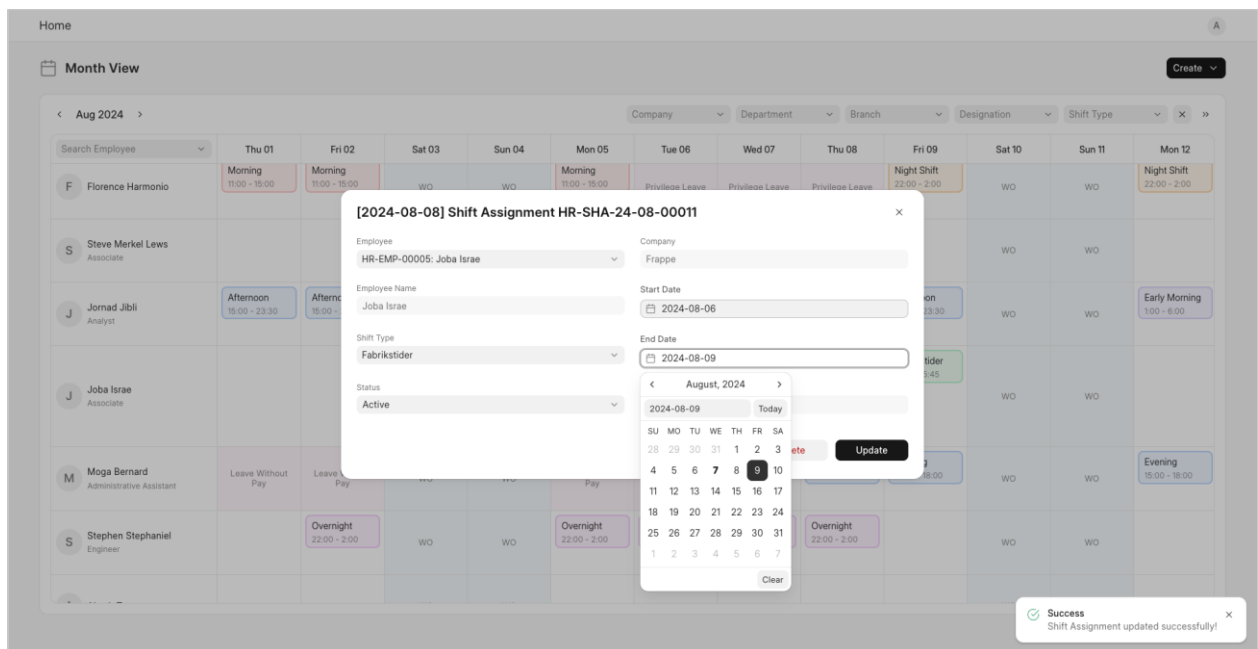
## Repeating/Scheduled Shifts

The user has the option to turn shifts spanning over a week into repeating shifts. This can be done by selecting specific days from the Repeat On Days field and setting the Frequency field—which represents the frequency of repetition. Doing so will fetch a Shift Schedule with these specifications, or create a new one if it does not exist. This Shift Schedule will then be assigned to the employee with the rest of the shift details via a Shift Schedule Assignment.



### 3.4 Viewing and Updating Shifts

Click on a shift to view it in detail. Edit its values and click on 'Update' to update it.



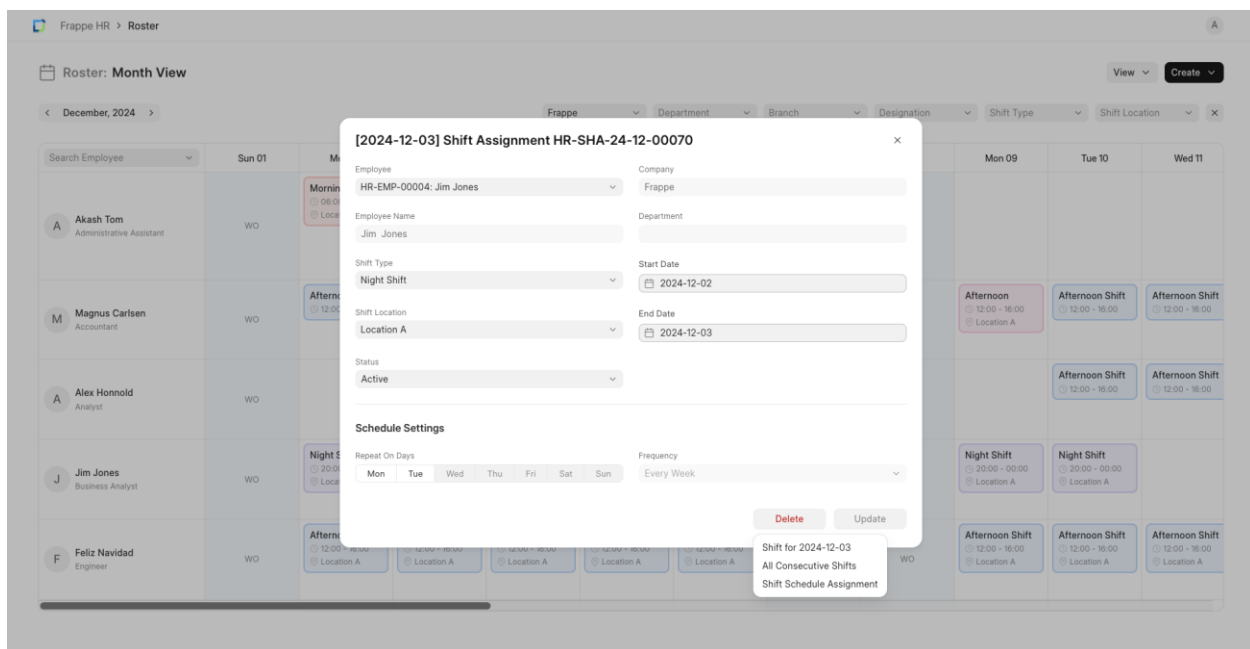
### 3.5 Deleting Shifts

Click on the Delete button to delete a shift. This presents the user with three options:-

Shift for [Date]: Delete the shift only on that date. This is done by updating the Shift Assignment and creating another one if needed.

All Consecutive Shifts: Delete the Shift Assignment altogether.

Shift Schedule Assignment: Delete the Shift Schedule Assignment and all the Shift Assignments associated with it.



### 3.5 Moving and Swapping Shifts

Shifts can be dragged and dropped to move them. Dropping a shift on another will swap it with that one.

## 4. Related Topics

1. [Shift Type](#)
2. [Shift Assignment](#)

3. Shift Schedule
4. Shift Schedule Assignment



# Leave Management

# Leaves

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

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

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

## Holiday List

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

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

To access Holiday List, go to:

Home > Human Resources > Leaves > Holiday List

### 1. How to create a Holiday List

1. Go to Holiday List, click on New.
2. Enter Holiday List Name. It can be based on the Fiscal Year or Location or Department as per the requirement.

3. Select From Date and To Date for the Holiday List.

The screenshot shows the '2021-2022' holiday list interface. At the top, there's a breadcrumb trail: 'HR > Holiday List > 2021-2022'. To the right is a search bar with the placeholder 'Search or type a command (Ctrl + G)', a bell icon, and a 'Help' link. Below the breadcrumb, there's a menu icon, the text '2021-2022', and navigation buttons: '<', '>', a printer icon, a refresh icon, and a blue 'Save' button. On the left side, there's a 'Shared With' section with a plus icon and a 'Tags' section with a tag icon and the text 'Add a tag ...'. The main content area has two input fields: 'From Date' with the value '01-04-2021' and 'To Date' with the value '31-03-2022'. To the right of these fields is a 'Total Holidays' section showing the value '0'.

## 2. Features

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

### 2.1 Adding Weekly Holidays

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

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

### 2.2 Adding Local Holidays

You can quickly add local holidays to the Holiday List as follows:

1. In the 'Add Local Holidays' section, select the country.
2. Some countries have subdivisions with different or additional holidays. If you like, you can optionally select a specific subdivision.
3. Click on the 'Add to Holidays' button.

**Can't find your country for fetching local holidays in Holiday List?**

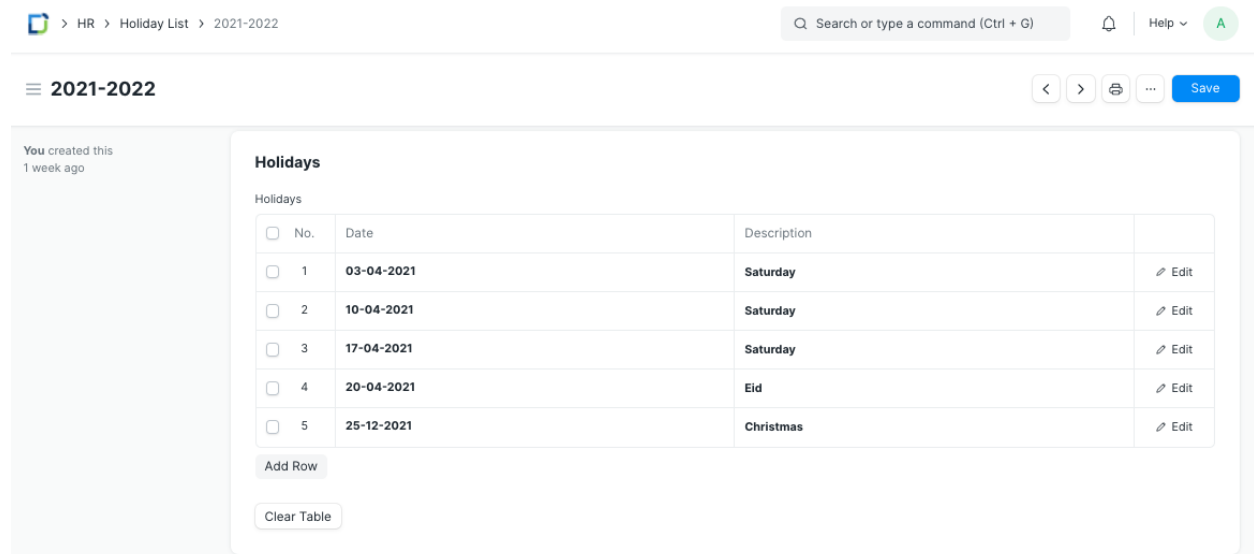
DellSuite HR uses an external package Holidays to get predictable holiday dates for countries. These are the list of countries supported:

<https://holidays.readthedocs.io/en/latest/#available-countries>

If your country is not listed here, you will have to manually add local holidays. If you are a developer, you can also consider contributing your country's holidays to the [original repository](#).

## 2.3 Adding Holidays manually

You can also add specific days manually by clicking on the 'Add row' option in the Holidays table.



The screenshot shows the DellSuite HR interface for the 'Holidays' table in the year 2021-2022. The table has five rows, each with a checkbox, a number, a date, a description, and an 'Edit' link. Below the table are buttons for 'Add Row' and 'Clear Table'.

<input type="checkbox"/>	No.	Date	Description	
<input type="checkbox"/>	1	03-04-2021	Saturday	<a href="#">Edit</a>
<input type="checkbox"/>	2	10-04-2021	Saturday	<a href="#">Edit</a>
<input type="checkbox"/>	3	17-04-2021	Saturday	<a href="#">Edit</a>
<input type="checkbox"/>	4	20-04-2021	Eid	<a href="#">Edit</a>
<input type="checkbox"/>	5	25-12-2021	Christmas	<a href="#">Edit</a>

Buttons: [Add Row](#), [Clear Table](#)

## 3. Holiday List in Company

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

The screenshot shows the 'Unico Plastics Inc.' configuration page. On the left, a sidebar indicates 'You created this 1 month ago'. The main area is titled 'Default Values' and contains several fields: 'Default Currency' (set to INR), 'Country' (set to India), 'Default Letter Head' (empty), 'Create Chart Of Accounts Based On' (set to Standard Template), 'Chart Of Accounts Template' (set to India - Chart of Accounts), and 'Default Holiday List' (set to 2021-2022, which is highlighted with a red box). At the top right, there is a search bar and a 'Save' button.

## 4. Holiday List in Employee

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

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

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

## 5. Holiday List in Workstation

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

Manufacturing > Workstation > Cutting Workstation

Search or type a command (Ctrl + G) | Help | A

≡ Cutting Workstation

Working Hours

Holiday List

2021-2022

Working Hours

No.	Start Time	End Time	Enabled	
1	06:00:00	20:00:00	<input checked="" type="checkbox"/>	Edit

Add Row

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

## Leave Type

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

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

To access Leave Type, go to:

Home > Human Resources > Leaves > Leave Type

### 1. How to create a Leave Type

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

HR > Leave Type > Privilege Leave

Search or type a command (⌘ + K)
Help

Privilege Leave
Not Saved

Assigned To
Attachments
Reviews
Tags
Share

Leave Allocation 2
+

Attendance
+

Leave Application 1 1
+

Leave Encashment
+

Maximum Leave Allocation Allowed in a Leave Period
30.00

Allow Leave Application After (Working Days)
60

Minimum working days required since Date of Joining to apply for this leave

Maximum Consecutive Leaves Allowed
7

☒ Is Carry Forward
☐ Is Leave Without Pay
☐ Is Partially Paid Leave
☐ Is Optional Leave

These leaves are holidays permitted by the company however, availing it is optional for an Employee.

☐ Allow Negative Balance
☐ Allow Over Allocation

Allows allocating more leaves than the number of days in the allocation period.

☒ Include holidays within leaves as leaves
☐ Is Compensatory

Carry Forward

Encashment

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

- Maximum Leave Allocation Allowed per Leave Period:** This field allows you to set the maximum number of the allocation allowed per Leave Period of this Leave Type while creating the Leave Policy.
- Allow Leave Application After (Working Days):** Enter the minimum number of working days here. Only the employees who have worked for this number of days or more since their Date of Joining will be allowed to apply for this particular leave type. Any other leaves (such as Casual Leave, Sick Leave.etc.) availed by the Employees after their joining date will also be considered while calculating working days of the Employee.
- Maximum Consecutive Leaves Allowed:** It refers to the maximum number of days this particular Leave Type can be availed at a stretch. If an employee exceeds the maximum number of days, their extended leave will be considered as 'Leave Without Pay'.
- Is Carry Forward:** If checked, the balance leaves of this Leave Type will be carried forward to the next allocation period.

- Is Leave Without Pay: This ensures that the Leave Type will be treated as leaves without pay and salary will get deducted for this Leave Type.
- Is Optional Leave: Optional Leaves are holidays that Employees can choose to avail from a list of holidays published by the company. The Holiday List for Optional Leaves can have any number of holidays, but you can restrict the number of such leaves by setting the Max Days Leave Allowed field.
- Allow Negative Balance: If checked, the system will always allow to apply and approve Leave Applications for the Leave Type, even if there is no leave balance.
- Allow Over Allocation: If checked, the system will allow allocating more leaves than the number of days in the allocation period.
- Include holidays within leaves as leaves: Check this option if you wish to count holidays within leaves as a 'leave'. For example, if an Employee has applied for leave on Friday and Monday, and Saturday and Sunday are weekly offs, if the 'Include holidays within leaves as leaves' checkbox for the Leave Type is checked, the system will consider Saturday as Sunday as leaves too. Such holidays will be deducted from the total number of leaves.
- Is Compensatory: Compensatory leaves are leaves granted for working overtime or on holidays, normally compensated as an encashable leave. You can check this option to mark the Leave Type as compensatory. An Employee can request for compensatory leaves using Compensatory Leave Request.

Introduced in version 13

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



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

Non-Encashable Leaves: This field indicates the number of leave days the Employees won't be able to encash. Above the mentioned days, the Employee is eligible to encash leaves.

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

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

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

## 2.2 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 basis by automatically updating Leave Allocation for leaves of this type at intervals set by 'Earned Leave Frequency'.

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

HR > Leave Type > Privilege Leave

Search or type a command (Ctrl + G)

Help

A

Privilege Leave

< > ⌂ ... Save

Earned Leave ^

☒ Is Earned Leave

Earned Leave Frequency

Monthly

Allocate on Day

First Day

The day of the month when leaves should be allocated

Rounding

0.5

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

## 2.3 Default Leave Types

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

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

## Leave Period

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

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

Home > Human Resources > Leaves > Leave Period

## 1. Prerequisites

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

- [Company](#)
- [Holiday List](#)

## 2. How to create a Leave Period

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

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

Note: The 'Holiday List for Optional Leaves' is not the same as the usual 'Holiday List'. This list will contain a list of optional holidays only. 'Holiday List for Optional Leaves' can be created from the [Holiday List](#) document. You can create two Holiday Lists for a Leave Period; one containing the usual set of holidays and the other for optional holidays.

Additionally, you can check the 'Is Active' checkbox if you want to enable this particular Leave Period.

The screenshot shows a web application interface for creating a Leave Period. The breadcrumb navigation at the top indicates the path: HR > Leave Period > HR-LPR-2021-00001. A search bar and user profile are also visible. The main form area is titled 'HR-LPR-2021-00001' with a 'Not Saved' indicator. On the left, there is a sidebar with sections for 'Attachments' (with an 'Attach File' button), 'Reviews' (with a '+' button), 'Shared With' (with a '+' button), and 'Tags' (with an 'Add a tag ...' button). The main form contains a 'Transactions' section with a 'Leave Allocation' button. Below this, there are input fields for 'From Date' (01-04-2021), 'To Date' (31-03-2022), 'Company' (Unico Plastics Inc), and 'Holiday List for Optional Leave' (2021-2022). An 'Is Active' checkbox is located at the bottom of the form.

## 3. Granting leaves based on Leave Period

To grant leaves based on Leave Period, use the [Leave Policy Assignment](#).

## Leave Policy

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

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

To access Leave Policy, go to:

Home > Human Resources > Leaves > Leave Policy

### 1. How to create a Leave Policy

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

HR > Leave Policy > HR-LPOL-2021-00001
Search or type a command (Ctrl + G)

## HR-LPOL-2021-00001 • Submitted

< > 🖨️ ⋮ Cancel

Assigned To

+

Attachments

Attach File +

Reviews

+

Shared With

+

Tags

Add a tag ...

---

0 · 0 FOLLOW

You edited this  
3 weeks ago

You created this  
3 weeks ago

### Connections ^

Leaves

Leave Allocation +

### Leave Allocations

Leave Policy Details

No.	Leave Type	Annual Allocation	
<input type="checkbox"/> 1	Sick Leave	10	
<input type="checkbox"/> 2	Casual Leave	10	
<input type="checkbox"/> 3	Privilege Leave	10	
<input type="checkbox"/> 4	Leave Without Pay	5	
<input type="checkbox"/> 5	Compensatory Off	5	

Add Row

Once submitted, you can create Leave Policy Assignment to assign this policy to multiple employees.

## Leave Policy Assignment

Introduced in Version 13

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

Home > Human Resources > Leaves > Leave Policy Assignment

## 1. Prerequisites

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

- Employee
- Leave Policy

## 2. How to create a Leave Policy Assignment

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

HR-LPOL-ASSGN-00009 Not Saved

Employee: **HR-EMP-00003**

Employee name: **Shristi**

Company: **frappe**

Leave Policy: **HR-LPOL-2020-00001**

Assignment based on: **Leave Period**

Leave Period: **HR-LPR-2020-00002**

Effective From: **01-08-2020**

Effective To: **01-02-2021**

☐ Add unused leaves from previous allocations

On submission, Leave Allocation documents would be created automatically based on the Leave Policy as shown below.





# Leave Allocation

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

To access Leave Allocation, go to:

Home > Human Resources > Leaves > Leave Allocation

## 1. Prerequisites

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

- [Employee](#)
- [Leave Type](#)
- [Leave Period](#)
- [Leave Policy](#)

## 2. How to create a Leave Allocation

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

HR > Leave Allocation > HR-LAL-2021-00001

Search or type a command (Ctrl + G)

Help

HR-LAL-2021-00001

Submitted

< > Print ... Cancel

Shared With

+

Tags

Add a tag ...

0 · 0

FOLLOW

You edited this just now

You created this just now

Employee \*

HR-EMP-00001

Employee Name

Albert Einstein

Company \*

Unico Plastics Inc

Leave Type \*

Privilege Leave

From Date \*

29-04-2021

To Date \*

31-03-2022

Allocation

New Leaves Allocated

10

☒ Add unused leaves from previous allocations

Unused leaves

0

Total Leaves Allocated \*

10

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

## 3. Features

### 1. Manually adding leaves to the current allocation

If your earned leave allocation failed due to some reasons like background jobs weren't running, you can manually allocate leaves for an allocation

Click on Actions > Allocate Leaves

HR > Leave Allocation > HR-LAL-2024-00017

Search or type a command (⌘ + K)

Help

Emily BluntSubmitted

View LedgerActionsExpire AllocationAllocate Leaves

Compensatory Leave Request+Leave Encashment+Employee Leave Balance

Employee \*HR-EMP-00021: Emily BluntLeave Type \*Earned Leave

Employee NameEmily BluntFrom Date \*01-01-2024

DepartmentResearch & DevelopmentTo Date \*31-12-2024

Company \*Frappe

Allocation

New Leaves Allocated1Compensatory Leave Request

☐ Add unused leaves from previous allocations

Total Leaves Allocated \*15Leave Period

Leave Policy AssignmentHR-LPOL-ASSGN-00108

Notes

Attachments+Reviews+Tags+Share+

And set the number of leaves you want to allocate. You can also set the From Date from when these leaves will be applicable. By default, it will consider today's date.

HR > Leave Allocation > HR-LAL-2024-00017

Search or type a command (⌘ + K)

Help

Emily BluntSubmitted

View LedgerActionsAssigned ToAttachmentsReviewsTagsShare

Compensatory Leave RequestEmployee Leave Balance

Employee \*HR-EMP-00021: Emily BluntLeave Type \*Earned Leave

Employee NameEmily BluntFrom Date \*01-01-2024

DepartmentResearch & DevelopmentTo Date \*31-12-2024

Company \*Frappe

Allocation

New Leaves Allocated1Compensatory Leave Request

☐ Add unused leaves from previous allocations

Total Leaves Allocated \*25Leave Period

Leave Policy AssignmentHR-LPOL-ASSGN-00108

Manual Leave Allocation

New Leaves to be Allocated \*2.00

From Date18-12-2024

To Date31-12-2024

Allocate

Click on allocate to add leaves to the balance

# Leave Control Panel

The Leave Control Panel allows you to allocate leaves in bulk based on a specific Leave Policy or Leave Type.

Home > Human Resources > Leaves > Leave Control Panel

## 1. Prerequisites

Before using the Leave Control Panel, it is advisable to create the following documents:

- [Employee](#)
- [Leave Period](#) (optional)
- [Leave Policy](#) / [Leave Type](#)

## 2. How to allocate leave using the Leave Control Panel

1. Choose the appropriate option from Dates Based On and fill in the corresponding data. This would include Leave Period or From Date and/or To Date.
2. If you wish to assign a Leave Policy, select the intended one. Alternatively, you can allocate leave directly by disabling Allocate Based On Leave Policy, selecting the desired Leave Type, and filling in the corresponding number of New Leaves Allocated.
3. Select Carry Forward if you wish to add unused leaves from the previous allocation into this one.
4. Use Quick Filters for filtering employees based on specific fields, or add additional custom filters through Advanced Filters.
5. Select suitable employees from the Select Employees table below and click on the Allocate Leave button at the top right corner.

> HR > Leave Control Panel

Q Search or type a command (Ctrl + G)

Help 

A

Leave Control Panel

Allocate Leave

Set Leave Details

Dates Based On

Leave Period

Leave Period \*

HR-LPR-2023-00002

From Date

01-07-2025

To Date

30-06-2026

☒ Carry Forward

Add unused leaves from previous leave period's allocation to this allocation

☒ Allocate Based On Leave Policy

Leave Policy \*

HR-LPOL-2023-00001

Quick Filters

Company

Frappe

Employment Type

Branch

Designation

Department

Employee Grade

Advanced Filters

Full Name

Like

akash

×

+ Add a Filter

Clear Filters

Select Employees

☐ Employee

☒ HR-EMP-00001

Akash

Frappe

Note: Leave cannot be allocated for past dates.

Leave Policy Assignments and Leave Allocations made using the Leave Control Panel are reflected in their respective DocTypes as shown below:

- Leave Policy Assignment

> HR > Leave Policy Assignment

Search or type a command (Ctrl + G)

Help

A

Leave Policy Assignment

Bulk Leave Policy Assignment

List View

...

Add Leave Policy Assignment

ID	Employee	Employee name	Company	Leave Policy	Filter	Last Updated On
<input type="checkbox"/>	<input type="checkbox"/>	Employee name	Status	Employee	Leave Policy	ID
<input type="checkbox"/>	<input type="checkbox"/>	Akash Tom	Submitted	HR-EMP-00001	HR-LPOL-2023-00001	HR-LPOL-ASSGN-0...

- Leave Allocation

> HR > Leave Allocation

Search or type a command (Ctrl + G)

Help

A

Leave Allocation

List View

...

Add Leave Allocation

ID	Employee	Employee Name	Leave Type	Leave Period	Leave Policy	Filter	Last Updated On
<input type="checkbox"/>	<input type="checkbox"/>	Expired					
<input type="checkbox"/>	<input type="checkbox"/>	Employee Name	Status	Employee	Leave Type	ID	2 of 2
<input type="checkbox"/>	<input type="checkbox"/>	Akash Tom	Submitted	HR-EMP-00001	Sick Leave	HR-LAL-2023-00002	1 m
<input type="checkbox"/>	<input type="checkbox"/>	Akash Tom	Submitted	HR-EMP-00001	Casual Leave	HR-LAL-2023-00001	1 m

## Leave Application

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

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

To access Leave Application, go to:

Home > Human Resources > Leaves > Leave Application

### 1. Prerequisites

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

- [Department](#)
- [Leave Period](#)
- [Holiday List](#)
- [Leave Type](#)
- [Leave Policy](#)
- [Leave Allocation](#)

## 2. How to create a Leave Application

1. Go to Leave Application list, click on New.
2. A table of Allocated Leaves will be shown. Based on the Leaves taken, the available leaves are displayed for each Leave Type.

Human Resources > Leave Application
Search or type a command (Ctrl + G)
Settings Help

New Leave Application 1 Not Saved
Save

DASHBOARD
Allocated Leaves

Leave Type	Total Allocated Leaves	Used Leaves	Pending Leaves	Available Leaves
Casual Leave	10	0	0	10
Privilege Leave	20	1	0	19
Sick Leave	10	0	0	10

Series
HR-LAP-.YYYY.-

Leave Type
Privilege Leave

Employee
HR-EMP-00001

Department
Research & Development - UP

Employee Name
George Smith

3. Select the Employee Name and Leave Type.
4. Set the Leave duration using From Date and To Date. Based on the dates selected, the 'Total Leave Days' and the 'Leave Balance Before Application' fields will be displayed.
5. If the Leave applied is for a half-day, select the 'Half Day' checkbox.
6. Enter the Reason for Leave.

New Leave Application 1
Not Saved
Save

Series HR-LAP-.YYYY.-	Leave Type Privilege Leave
Employee HR-EMP-00001	Department Research & Development - UP
Employee Name George Smith	Leave Balance Before Application 19

From Date 04-03-2020	Reason Travel
To Date 06-03-2020	
<input type="checkbox"/> Half Day	
Total Leave Days 3	

7. Select Leave Approver. 8. Select the Posting Date of the Leave Application. 9. Check the 'Follow via Email' checkbox to send notification of the Leave Application to the Leave Approver. 10. You can also link the Salary Slip of the Employee in the Leave Application for the record.

New Leave Application 1
Not Saved
Save

To Date 06-03-2020	
<input type="checkbox"/> Half Day	
Total Leave Days 3	

Leave Approver prasad@erpnext.com	Status Open
Leave Approver Name Prasad Ramesh	Salary Slip Sal Slip/HR-EMP-00001/00002

Posting Date 30-03-2020	Company Unico Plastics Inc.
<input checked="" type="checkbox"/> Follow via Email	Letter Head Horizon Technologies
Color #ff4d4d	

11. Click on Save. Once the Employee saves the Leave Application, the status of the Leave Application changes to 'Open', and an email is sent to the Leave Approver for approval. The Leave



Approval Notification Template can be configured in [HR Settings](#) under the Leave Settings section.

12. Once the Leave Approver receives the email, they can Approve, Reject, or Cancel the Leave Application. Once this is done, the Leave Approver can submit the Leave Application. On submission, the status of the document changes accordingly, and an email is sent to the Employee notifying them the same.

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

The Leave Application process flow is summarized below:

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

## **3. Features**

### **3.1 Setting Leave Approver**

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

- Department Level: Leave Approvers for each department can be configured in the [Department](#) master. Multiple Leave Approvers can be set in a Department. The first Leave Approver in the list will be considered as the default Leave Approver.

Accounts - UP
Enabled

+

You edited this a few seconds ago

You created this 9 months ago

LEAVE APPROVERS

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

Leave Approver

<input type="checkbox"/>	Approver	
<input type="checkbox"/>	1 prasad@erpnext.com	▼
<input type="checkbox"/>	2 matt@example.com	▼
<input type="checkbox"/>	3 bruce@example.com	▼

Add Row

When an Employee belonging to a particular department applies for leave, the Leave Approvers set in that Employee's department master will be considered as his Leave Approvers. \* Employee Level: Leave Approvers can also be set Employee-wise in the employee master.

Gavin
Not Saved

HR-EMP-00002

Menu

Save

APPROVERS

Expense Approver

anurag@erpnext.com

Shift Request Approver

anurag@erpnext.com

Leave Approver

anurag@erpnext.com

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

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

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

Additional Notes:

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

To understand how DellSuite HR allows you configure leaves for employees, check [Leaves](#).

## Compensatory Leave Request

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

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

Note: Only Leave Types which are marked as 'Is Compensatory' can be selected in the Compensatory Leave Request.

To access Compensatory Leave Request, go to:

Home > Human Resources > Leaves > Compensatory Leave Request

### 1. Prerequisites

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

- [Employee](#)

- [Leave Period](#)
- [Leave Type](#)
- [Leave Policy](#)
- [Leave Allocation](#)
- [Holiday List](#)
- [Attendance](#)

## 2. How to create a Compensatory Leave Request

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

HR > Compensatory Leave Request > new-compensatory-leave-request-1

Search or type a command (Ctrl + G) | Help | A

**New Compensatory Leave Request** • Not Saved Save

**Employee \***

HR-EMP-00001

Employee Name

Albert Einstein

**Leave Type**

Compensatory Off

**Worked On Holiday**

**Work From Date \***

15-04-2021

**Work End Date \***

16-04-2021

☐ Half Day

**Reason \***

Customer Training

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

## Leave Encashment

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

To access Leave Encashment, go to:

Home > Human Resources > Leaves > Leave Encashment

### 1. Prerequisites

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

1. [Employee](#)
2. [Leave Type](#)
3. [Leave Policy](#)
4. [Leave Period](#)
5. [Salary Structure](#)
6. [Salary Structure Assignment](#)

### 2. How to create a Leave Encashment

1. Go to Leave Encashment list, click on New.
2. Select Leave Period.
3. Select the Employee. Once the Employee is selected, the Employee's Department is automatically fetched.

4. Select Leave Type for which the Leave is encashed. Make sure the Leave Type is encashable (the 'Allow Encashment' checkbox in the Leave Type is checked).
5. Select Encashment Date, if you want payment via Salary Slip. Based on the date selected, the amount will be encashed in that particular Payroll Entry.
6. Save and Submit.

Human Resources > Leave Encashment

Search or type a command (Ctrl + G)

Settings Help 82

HR-ENC-2019-00001 Submitted

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

♥

You edited this a few seconds ago

You created this a few seconds ago

Leave Period

HR-LPR-2019-00001

Employee

HR-EMP-00004: Kim John

Employee Name

Kim John

Leave Type

Casual Leave

Leave Allocation

HR-LAL-2019-00006

Leave Balance

10

Encashable days

5

PAYROLL

Encashment Amount

₹ 5,000.00

Encashment Date

24-08-2019

Additional Salary

HR-ADS-19-08-00001

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

### 3. Leave Encashment Payment Methods

In DellSuite HR, we allow you to pay the encashment amount via Salary Slip or Payment Entry.

### 3.1 Payment via Payment Entry

1. To pay the Leave Encashment amount via Payment Entry you need to check Pay via Payment Entry checkbox.
2. After that, it will allow you to select Payable Account and Expense Account.
3. After Submitting the record click on the button "Create Payment Entry" which will redirect you to the Payment Entry Form fill in the details, save, and submit.

### 3.2 Payment via Salary Slip

1. To pay the Leave Encashment amount via Salary Slip you need to make sure that checkbox Pay via Payment Entry is unchecked.
2. Select the Encashment Date. Based on the date selected, the amount will be encashed in that particular Payroll Entry. Save and Submit. On submitting a Leave Encashment for an Employee, DellSuite HR automatically creates an Additional Salary which will get added to the Salary Slip of the Employee when processing the payroll.

## Leave Block List

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

To access Leave Block List, go to:

Home > Human Resources > Leaves > Leave Block List

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

## 1. Prerequisites

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

- [Company](#)
- [Department](#)
- [Leave Period](#)
- [Holiday List](#)

## 2. How to create a Leave Block List

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

HR > Leave Block List > Block List

Search or type a command (Ctrl + G)

Help

Block List

< > ⌂ ... Save

+

Shared With

+

Tags

Add a tag ...

0 · 0

FOLLOW

You edited this just now

You created this just now

Company \*

Unico Plastics Inc

☒ 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.

Leave Block List Dates

<input checked="" type="checkbox"/> No.	Block Date	Reason	
<input type="checkbox"/> 1	28-05-2021	AGM	Edit
<input type="checkbox"/> 2	31-05-2021	Annual get together	Edit

Delete All Add Row

Allow Users

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

Leave Block List Allowed

<input type="checkbox"/> No.	Allow User	
------------------------------	------------	--



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

## Leave Ledger Entry

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

Human Resources

Search or type a command (Ctrl + G)

Settings ▾ Help ▾ 2

Report: Leave Ledger Entry

Menu ▾ Refresh

Reports ▾  
List  
Calendar ▾  
Kanban ▾  
Assigned To ▾  
  
SAVE FILTER  
Filter Name  
  
Tags  
No Tags  
Show tags

7

ID

Add Filter

Add Group Last Modified On

	ID	Employee	Employee Name	Leave Type	Transaction Ty...	Transaction N...	Leaves	
<input type="checkbox"/>								
<input type="checkbox"/>	1	d268786d96	HR-EMP-00001: ...	Sample Employee	Casual Leave	Leave Allocation	HR-LAL-2019-0...	15
<input type="checkbox"/>	2	6a5673cf6e	HR-EMP-00001: ...	Sample Employee	Casual Leave	Leave Allocation	HR-LAL-2019-0...	15
<input type="checkbox"/>	3	9f55d3d362	HR-EMP-00001: ...	Sample Employee	Casual Leave	Leave Allocation	HR-LAL-2019-0...	15
<input type="checkbox"/>	4	cc0d80204a	HR-EMP-00002:...	Mangesh Shrira...	Casual Leave	Leave Allocation	HR-LAL-2019-0...	10
<input type="checkbox"/>	5	08d830a80b	HR-EMP-00002:...	Mangesh Shrira...	Casual Leave	Leave Application	HR-LAP-2019-0...	-3
<input type="checkbox"/>	6	e3c41ce3f7	HR-EMP-00001: ...	Sample Employee	Sick Leave	Leave Allocation	HR-LAL-2019-0...	12
<input type="checkbox"/>	7	7803ff61e4	HR-EMP-00001: ...	Sample Employee	Privilege Leave	Leave Allocation	HR-LAL-2019-0...	12

## Leave Ledger Report

This report allows you to view the ledger impact for all your leave-related transactions:

1. Leave Allocation
2. Leave Application
3. Leave Encashment

Leave Ledger								
<div> <div>01-01-2023</div> <div>31-12-2023</div> <div>Leave Type</div> <div>Employee</div> <div>Active</div> <div>Frappe</div> </div> <div> <div>Department</div> <div>Transaction Type</div> <div>Transaction Name</div> </div>								
Employee	Creation Date	From Date	To Date	Leaves	Leave Type	Transaction T...	Transaction Name	Is Carr...
HR-EMP-00002: Mohan Rai	31-12-2023	31-12-2023	31-12-2023	1.83	Earned Leave	Leave Allocation	HR-LAL-2023-00075	
HR-EMP-00002: Mohan Rai	05-01-2024	31-12-2023	31-12-2023	-18.00	Earned Leave	Leave Allocation	HR-LAL-2023-00075	
HR-EMP-00003: Robert House	02-05-2023	02-05-2023	31-05-2023	30.00	Casual Leave	Leave Allocation	HR-LAL-2023-00048	
HR-EMP-00003: Robert House	20-10-2023	31-05-2023	31-05-2023	-30.00	Casual Leave	Leave Allocation	HR-LAL-2023-00048	
HR-EMP-00003: Robert House	28-09-2023	01-01-2023	31-12-2023	8.00	Earned Leave	Leave Allocation	HR-LAL-2023-00127	
HR-EMP-00003: Robert House	31-10-2023	31-10-2023	31-12-2023	1.00	Earned Leave	Leave Allocation	HR-LAL-2023-00127	
HR-EMP-00003: Robert House	30-11-2023	30-11-2023	31-12-2023	1.00	Earned Leave	Leave Allocation	HR-LAL-2023-00127	
HR-EMP-00003: Robert House	31-12-2023	31-12-2023	31-12-2023	1.00	Earned Leave	Leave Allocation	HR-LAL-2023-00127	
HR-EMP-00004: Olivia Robert	02-05-2023	02-05-2023	31-05-2023	30.00	Casual Leave	Leave Allocation	HR-LAL-2023-00049	
HR-EMP-00004: Olivia Robert	20-10-2023	31-05-2023	31-05-2023	-30.00	Casual Leave	Leave Allocation	HR-LAL-2023-00049	
HR-EMP-00004: Olivia Robert	02-05-2023	02-05-2023	31-05-2023	30.00	Sick Leave	Leave Allocation	HR-LAL-2023-00065	
HR-EMP-00004: Olivia Robert	20-10-2023	31-05-2023	31-05-2023	-30.00	Sick Leave	Leave Allocation	HR-LAL-2023-00065	
HR-EMP-00005: Agatha	02-05-2023	02-05-2023	31-05-2023	30.00	Casual Leave	Leave Allocation	HR-LAL-2023-00050	
HR-EMP-00005: Agatha	20-10-2023	31-05-2023	31-05-2023	-30.00	Casual Leave	Leave Allocation	HR-LAL-2023-00050	
HR-EMP-00006: Isha Joshi	02-05-2023	02-05-2023	31-05-2023	30.00	Casual Leave	Leave Allocation	HR-LAL-2023-00051	
HR-EMP-00006: Isha Joshi	20-10-2023	31-05-2023	31-05-2023	-30.00	Casual Leave	Leave Allocation	HR-LAL-2023-00051	
HR-EMP-00007: Ram	02-05-2023	02-05-2023	31-05-2023	30.00	Casual Leave	Leave Allocation	HR-LAL-2023-00052	
HR-EMP-00007: Ramesh	20-10-2023	31-05-2023	31-05-2023	-30.00	Casual Leave	Leave Allocation	HR-LAL-2023-00052	

This report gives you an overview of:

1. Ledger entry creation date
2. Ledger transaction dates (From Date - To Date)
3. Leaves (added/consumed/deducted)
4. Leave Type
5. Linked transaction details (Type & Name)
6. Any special flags: Is Carry Forward, Is Expired, Is Leave Without Pay
7. Company & Holiday List linked to it

You can use the View Ledger button in transactions to view the linked ledger entries in the report view

# Performance

# Appraisal Template

You can define the KRAs and Feedback Criteria based on which employees would be rated in the Appraisal Template.

To access Appraisal Template, go to:

Home > Human Resources > Performance > Appraisal Template

## 1. Prerequisites

Before creating an Appraisal Template, you should create the following:

- KRA: Key Result Areas master to align your goals against
- Employee Feedback Criteria: Criteria based on which employees should be rated in Performance Feedback and Self Appraisal

## 2. How to create an Appraisal Template

1. Go to the Appraisal Template list, and click on New.
2. Enter a title for the Template. You can keep the title same as the Department or Designation you are creating the template for.
3. You can optionally set some description.
4. Add the KRAs (Key Result Areas) along with their weightages.
5. Add the Criteria based on which employees should be rated in Performance Feedback and Self Appraisal.

Employee Lifecycle > Appraisal Template > Engineering

Search or type a command (Ctrl + G)

Help

A

Engineering

Assigned To

Attachments

Attach File

Reviews

Shared With

Tags

Add a tag ...

0 · 0 FOLLOW

You edited this 2 days ago

You created this 7 months ago

Connections

3 Appraisal 3 +

2 Designation +

Description

KRAs

<input type="checkbox"/>	No.	KRA *	Weightage (%) *	
<input type="checkbox"/>	1	Development	30%	Edit
<input type="checkbox"/>	2	Design	30%	Edit
<input type="checkbox"/>	3	Quality	20%	Edit
<input type="checkbox"/>	4	Documentation	10%	Edit
<input type="checkbox"/>	5	Automation	10%	Edit

Add Row

Rating Criteria

Criteria based on which employee should be rated in Performance Feedback and Self Appraisal

<input type="checkbox"/>	No.	Criteria *	Weightage (%) *	
<input type="checkbox"/>	1	Accountability	25%	Edit
<input type="checkbox"/>	2	Excellence	50%	Edit
<input type="checkbox"/>	3	Problem Solving Ability	25%	Edit

Once you create the templates, you can link them to the respective Designations.

Designation > Engineering Lead

Search or type a command (Ctrl + G)

Help

A

Engineering Lead

Assigned To

Attachments

Attach File

Reviews

Shared With

Tags

Add a tag ...

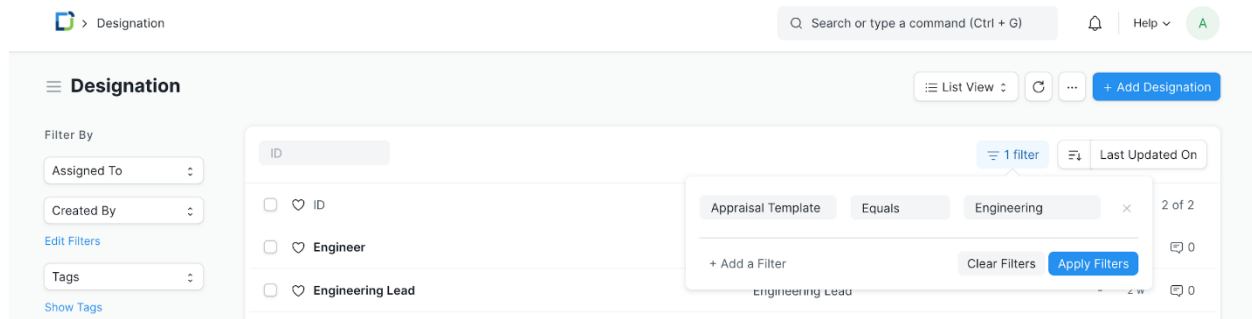
0 · 0 FOLLOW

Description

Appraisal Template

Engineering

You can link a template to multiple designations



### 3. Related Topics

1. [Appraisal](#)
2. [Employee Performance Feedback](#)

## Appraisal Cycle

An Appraisal Cycle is a defined period of time during which the overall performance of an employee is assessed.

To create an Appraisal Cycle, go to:

Home > Human Resources > Performance > Appraisal Cycle

### 1. Prerequisites

Before creating an Appraisal Cycle, you should create [Appraisal Templates](#) for different designations.

You can link them in the Designation master for fetching them automatically in the cycle or manually select relevant templates in the Appraisees child table.

### 2. How to create an Appraisal Cycle

1. Go to the Appraisal Cycle list, and click on New.

2. Enter the Cycle Name.
3. Select the Company and set the Start and End dates.
4. Select the KRA Evaluation Method:
  - Automated Based on Goal Progress (Default): Your KRA/Goal score will be automatically calculated based on your goal completion linked to that KRA. You can read more about [here](#).
  - Manual Rating: You can choose to rate Goals/KRAs manually. This is the original evaluation method used until v13.
5. By default, the Final Score is calculated as the average of Goal Score, Feedback Score, and Self Appraisal Score. To calculate final score using your own formula, enable *Calculate Final Score based on Formula* and enter the formula expression.

> HR > Appraisal Cycle > 23-24

Search or type a command (⌘ + G)

Help

23-24 In Progress

View Goals Create Appraisals < > ⌵ ⌵ Mark as Completed

Assigned To +

Attachments +

Reviews +

Tags +

Share +

0 0 FOLLOW

You last edited this · 1 minute ago

You created this · 1 year ago

Overview

Applicable For

Stats

Appraisees: 4 Self Appraisal Pending: 3 Employees without Feedback: 3 Employees without Goals: 4

Connections

4 Appraisal 4 + 1 Employee Performance Feedback + 1 Goal +

Company \*

Frappe

Start Date \*

01-04-2023

Status

In Progress

End Date \*

31-03-2024

Description

Settings

KRA Evaluation Method

Automated Based on Goal Progress

☒ Calculate Final Score based on Formula

By default, the Final Score is calculated as the average of Goal Score, Feedback Score, and Self Appraisal Score. Enable this to set a different formula

Final Score Formula \*

1 goal\_score \* 0.4 + average\_feedback\_score \* 0.4 + self\_appraisal\_score \* 0.2

## 3. Actions

## 3.1 Create Appraisals

You can create appraisals in bulk from the Appraisal Cycle.

1. In the "Applicable For" tab, set relevant filters to fetch the employees included in this cycle.  
You can choose to create separate cycles for a particular Branch, Department, or Designation.  
Ex: Engineering could have an yearly cycle but Sales might need a half-yearly cycle.
2. After setting the filters, click on the Get Employees button and save. This will fetch the employees based on the set filters.
3. You can check the Employees table to find the fetched employees. You can add more employees to be included in the cycle manually by clicking on the Add Row button.
4. Click on the Create Appraisals button. This will create all the Appraisal documents for the selected employees.
5. Click on Start button to start the cycle.

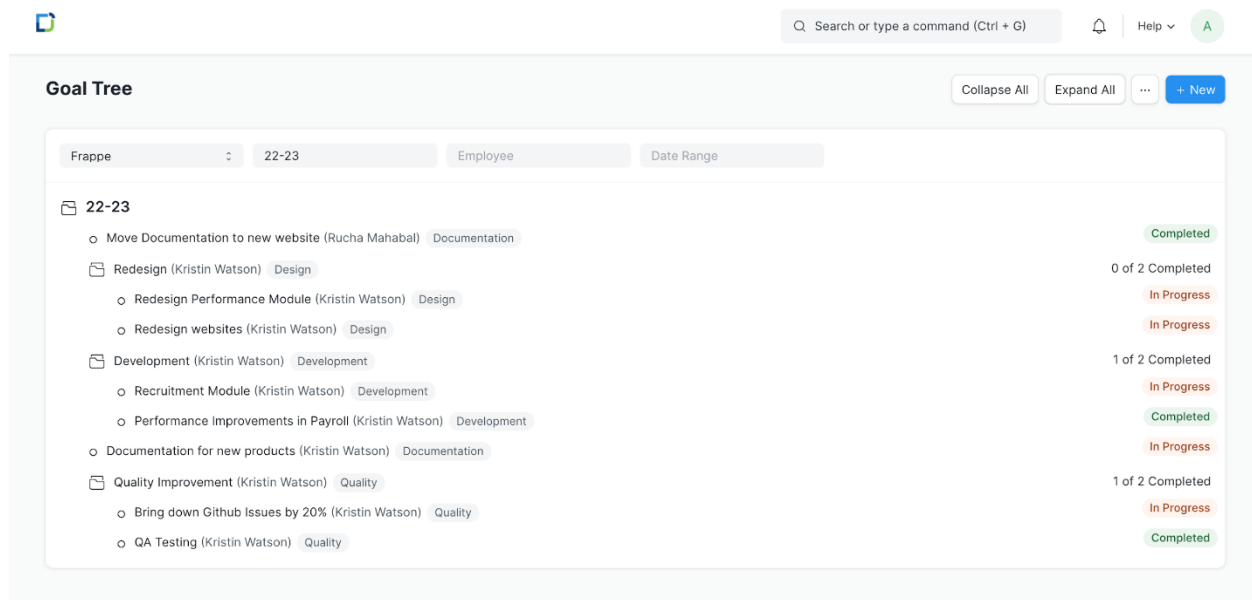
If an employee joins after the cycle has already started, you can:

- Create an Appraisal document for them separately and select the cycle.
- Or, add rows for new employees in the cycle's Employees child table, save and click on Create Appraisals again. This will create appraisals for the newly added employees.

## 3.2 View Goals

With this button, you can view the goals linked to the cycle. This button will navigate you to the Goal Tree filtered by the Appraisal Cycle.



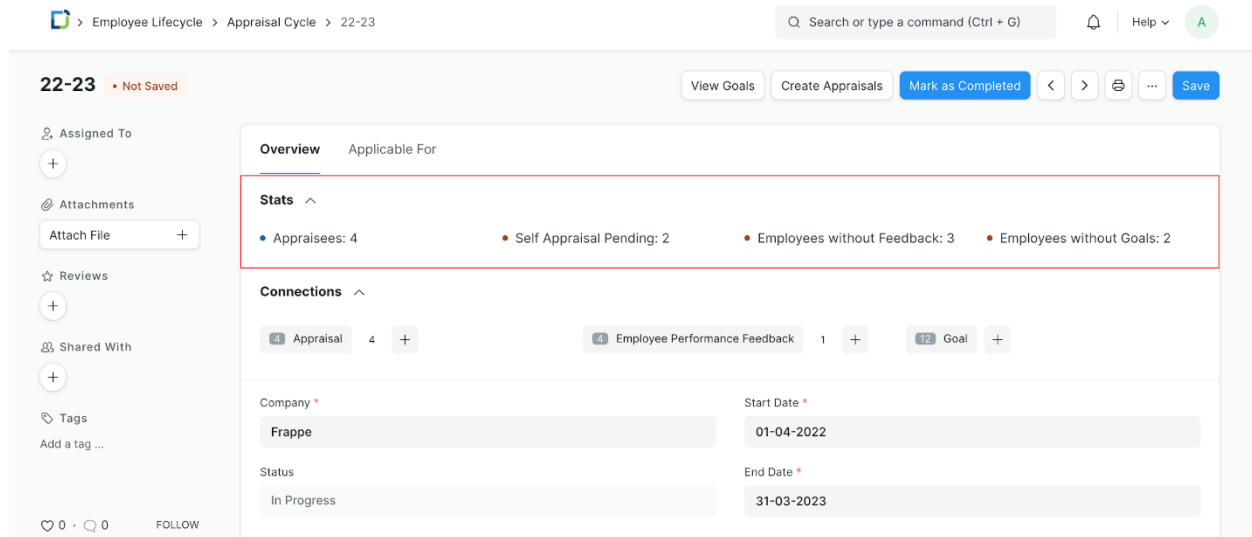


## 4. Features

### 4.1 Appraisal Stats

The Stats section in the cycle will give you an overview of:

- Appraisees: The number of appraisees included in the cycle
- Self Appraisal Pending
- Employees without Feedback
- Employees without Goals



## 5. Related Topics

1. [Appraisal](#)
2. [Goal](#)
3. [Employee Performance Feedback](#)

## Appraisal

An appraisal is a process in which an employee's performance is documented and evaluated.

To create an Appraisal Cycle, go to:

Home > Human Resources > Performance > Appraisal

### 1. Prerequisites

Before creating an Appraisal, you should create the following:

- [Appraisal Template](#)

- [Appraisal Cycle](#)

## 2. How to create an Appraisal

Appraisals can be created in bulk from the [Appraisal Cycle](#).

However, if you want to create an appraisal manually, here are the steps:

1. Go to the Appraisal list, and click on New.
2. Select the Employee
3. Select the Appraisal Cycle.
4. If the Appraisal Template for the employee is already set in the cycle's Employees child table, it will be auto-fetched. Else you can select a template for the employee. Save.

## 3. Features

### 3.1 KRA Evaluation

Based on the KRA Evaluation Method selected in the [Appraisal Cycle](#) one of the following processes would be applicable:

#### 3.1.1 Automated Based on Goal Progress

This is the default KRA Evaluation method.

In this method you can create goals and sub-goals aligned to your KRAs.

A KRA vs Goals table will be visible in your appraisal document.

- KRA and weightage: Fetched from the appraisal template
- Goal Completion (%): Your goal completion percentage will be auto-calculated based on the progress of the goals linked to your KRAs.

- **Goal Score (weighted):** Based on the weightage assigned to each KRA, the Goal Score will be computed from the completion percentage. For ex: In the screenshot below, the Development KRA has 30% weightage and the employee has completed 75% of the goals. So the goal score is 22.5 out of 30, and so on.

You will finally get a Total Goal Score (out of 5) based on the Goal Score (%).

Employee Lifecycle > Appraisal > HR-APR-22-0800002


Search or type a command (Ctrl + G)

Help

**Kristin Watson**
Not Saved

View Goals

Save



Assigned To

Attachments

kristin.jpeg

Attach File

Reviews

+100

Shared With

Tags

Add a tag ...

0 · 2


FOLLOW

Kristin Watson edited this 59 minutes ago

You created this 6 months ago

Overview
**KRAs**
Feedback
Self Appraisal

Scores



Maximum Score
Score Obtained

Appraisal Template \*

Engineering

Rate Goals Manually

KRA vs Goals

No.	KRA *	Weightage (%) *	Goal Completion (%)	Goal Score (weighted)	
1	Development	30%	75%	22.50	Edit
2	Design	30%	35%	10.50	Edit
3	Quality	20%	75%	15	Edit
4	Documentation	10%	70%	7	Edit
5	Automation	10%	0%	0	Edit

Add Row

Goal Score (%)

55

Total Goal Score

2.75

Out of 5

### 3.1.2 Manual Rating

You can choose to rate Goals/KRAs manually. This is the original evaluation method used until v13.

1. Based on the template selected, the KRAs will be fetched in the Goals section.

2. Enter the score (0-5) for each KRA.
3. Based on the weightage mentioned, the Score Earned will be calculated for each KRA.
4. Save.

Based on the Score Earned for each KRA, the system will calculate the Total Score (out of 5) for the Employee.

Employee Lifecycle > Appraisal > HR-APR-23-0300010

Search or type a command (Ctrl + G) | Help | A

Mohan Rai • Draft

View Goals < > ⌵ ⌵ Submit

Submit this document to confirm

Overview **KRAs** Feedback Self Appraisal

Appraisal Template \*  
Engineering

☒ Rate Goals Manually

Goals

<input type="checkbox"/>	No.	Goal *	Weightage (%) *	Score (0-5)	Score Earned	
<input type="checkbox"/>	1	Development	30	5	1.50	
<input type="checkbox"/>	2	Design	30	4	1.20	
<input type="checkbox"/>	3	Quality	20	3	0.60	
<input type="checkbox"/>	4	Documentation	10	5	0.50	
<input type="checkbox"/>	5	Automation	10	2	0.20	

Add Row

Remarks

0 0 0 FOLLOW

## 3.2 Feedback

Employee Performance Feedback is captured in the Employee Performance Feedback DocType.

But to get an overview of the employee's performance, you can see the history of all the feedback employee has received in the cycle under the Feedback tab.

You can see the rating summary with the average feedback score, no of reviews, and the percentage distribution of the stars the employee has received.



Can speak up more and convey your opinions

Talented and passionate software engineer with thorough knowledge in software engineering from inside and out  
Shows initiative with developing new ways of thinking to improve projects or company performance"  
Familiarize yourself with version control concepts and tools like GitHub

If you have the required permissions, you can submit the performance feedback right from this view by clicking on the New Feedback button.

**Add Feedback**

Feedback \*

Great Work!

Feedback Rating

<input type="checkbox"/> Criteria *	Weightage	Rating	
<input type="checkbox"/> Accountability	25%	★★★★☆	
<input type="checkbox"/> Excellence	50%	★★★★★	
<input type="checkbox"/> Problem Solving Ability	25.00	★★★★★	

Submit

### 3.3 Self Appraisal

Under the Self Appraisal tab, employees can rate themselves and add reflections on their performance. The Total Self Score is calculated based on the rating and the weightage against each Feedback Criteria.



Things that worked well:

The Final Score is calculated as an average of your Goal Score, Avg Feedback Score, and Self Appraisal Score.



Employee Lifecycle > Appraisal > HR-APR-22-0800002

Search or type a command (Ctrl + G)

Help

Kristin Watson

Draft

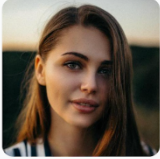
View Goals

<

>

...

Submit



Assigned To

+

Attachments

kristin.jpeg

Attach File

+

Reviews

+100

+

Shared With

+

Tags

Add a tag ...

Submit this document to confirm

Overview

KRAs

Feedback

Self Appraisal

Employee \*

HR-EMP-00008

Company \*

Frappe

Employee Name

Kristin Watson

Status \*

Draft

Department

Research & Development

Appraisal Cycle \*

22-23

Designation

Engineer

Final Score

3.17

Average of Goal Score, Feedback Score, and Self Appraisal Score (out of 5)

Add a comment

## 3.5 View Goals

You can view the Employee's goals linked to that Appraisal Cycle by clicking on the View Goals button:

Search or type a command (Ctrl + G)

Help

Goal Tree

Collapse All

Expand All

...

+ New

Frappe

22-23

HR-EMP-00008

Date Range

HR-EMP-00008

Redesign (Kristin Watson)

Design

0 of 2 Completed

Redesign Performance Module (Kristin Watson)

Design

In Progress

Redesign websites (Kristin Watson)

Design

In Progress

Development (Kristin Watson)

Development

1 of 2 Completed

Recruitment Module (Kristin Watson)

Development

In Progress

Performance Improvements in Payroll (Kristin Watson)

Development

Completed

Documentation for new products (Kristin Watson)

Documentation

In Progress

Quality Improvement (Kristin Watson)

Quality

1 of 2 Completed

Bring down Github Issues by 20% (Kristin Watson)

Quality

In Progress

QA Testing (Kristin Watson)

Quality

Completed

### 3.6 Approvals for Appraisals

Finally, once you have captured all the feedback and updated goals and self appraisal in the Appraisal document, you can submit it.

You can also set up a [Workflow](#) for approvals before Appraisal submission.

## 4. Related Topics

1. [Goal](#)
2. [Employee Performance Feedback](#)

## Employee Performance Feedback

The Employee Performance Feedback document allows you to capture 360° feedback on the employee's performance. Reviewers can rate the employee based on some criteria set up in the Appraisal Template and add a written feedback assessing the employee's performance throughout the cycle.

To create an Employee Performance Feedback, go to:

Home > Human Resources > Performance > Employee Performance Feedback

## 1. Prerequisites

Before creating a Performance Feedback, you should create the following:

- [Appraisal Template](#)
- [Appraisal Cycle](#)
- [Appraisal](#)

## 2. How to create an Employee Performance Feedback

### 2.1 From the Appraisal

You can directly give feedback to an employee from their Appraisal document. If you have the required permissions, you can submit the performance feedback right from this view by clicking on the New Feedback button.

The screenshot shows a web application interface for managing appraisals. In the background, the 'Appraisal' document for 'Kristin Watson' is visible, showing a profile picture, a 'Draft' status, and a 'Submit this doc' button. The 'Add Feedback' modal is open in the foreground, featuring a text editor with the text 'Great Work!'. Below the text editor is a 'Feedback Rating' table with columns for 'Criteria', 'Weightage', and 'Rating'. The table contains three rows: 'Accountability' (25% weightage, 4-star rating), 'Excellence' (50% weightage, 5-star rating), and 'Problem Solving Ability' (25.00 weightage, 4-star rating). A 'Submit' button is located at the bottom right of the modal.

Criteria *	Weightage	Rating
<input type="checkbox"/> Accountability	25%	★★★★☆
<input type="checkbox"/> Excellence	50%	★★★★★
<input type="checkbox"/> Problem Solving Ability	25.00	★★★★☆

For more details about the feedback timeline check [Appraisal](#)

### 2.2 Direct creation

1. Go to the Employee Performance Feedback list, and click on New.
2. Select the Employee.
3. If your session user is linked to some employee, that employee will be auto-selected as the reviewer. Else you can select the reviewer.

4. Select the Appraisal document against which you want to give the feedback.
5. The feedback criteria set in the Appraisal Template in the Appraisal document will be pulled into the Feedback Ratings child table.
6. You can rate the employee for each criteria and add your feedback under the feedback.
7. Save and Submit.

Employee Lifecycle > Employee Performance Feedback > HR-PF-2023-00009

Help
A

Kristin Watson

Submitted

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0

0

FOLLOW

You edited this

14 hours ago

Rucha Mahabal created this

1 week ago

Employee Details

Feedback

For Employee \*

HR-EMP-00008: Kristin Watson

Reviewer \*

HR-EMP-00001

Added On \*

20-03-2023 22:06:51

Employee Name

Kristin Watson

Reviewer Name

Rucha Mahabal

Appraisal Cycle

22-23

Department

Research & Development

Designation

Engineer

Designation

Engineer

User

ruchamahabal2@gmail.com

Company \*

Frappe

Appraisal \*

HR-APR-22-0800002

Feedback Ratings

No.	Criteria *	Weightage (%) *	Rating	
1	Accountability	25%	★★★★☆	Edit
2	Excellence	50%	★★★★☆	Edit
3	Problem Solving Ability	25%	★★★★☆	Edit

Total Score

3.63

## 3. Features

### 3.1 Average Feedback Score

On submitting a feedback, the average feedback score will be updated in the linked appraisal.

Cancelling the feedback will update the score again.

## 3.2 Approvals for Appraisals

If you don't want employees to submit feedback directly, You can also set up a [Workflow](#) for approvals before submission.

## 3. Related Topics

1. [Appraisal](#)

## Goal

Goal setting is the process of planning specific, measurable and role-oriented goals that employees work towards in your company.

To check the goal list, go to:

Home > Human Resources > Performance > Goal

## 1. Prerequisites

Before creating a Goal, you should create the following:

- [Employee](#)

If you want the goal's progress to impact your appraisals, you will also need to create:

- [Appraisal Cycle](#)
- [Appraisal](#)

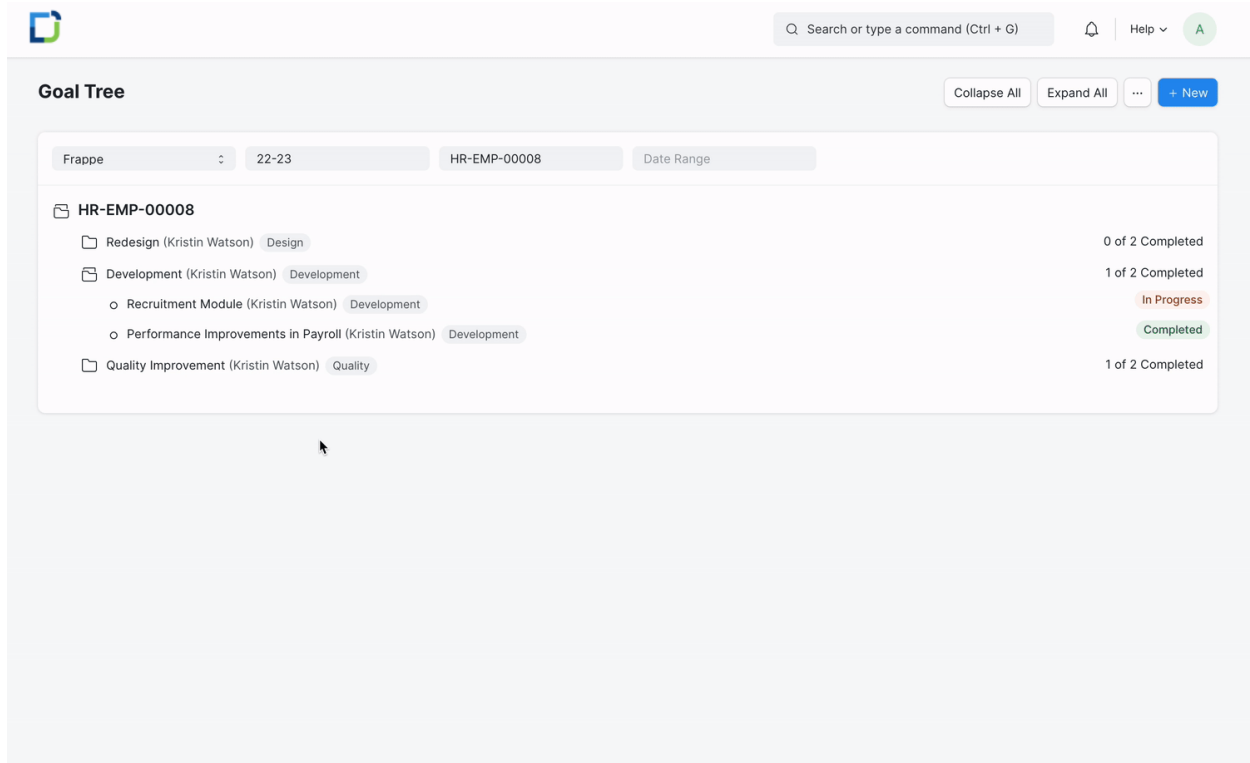
## 2. Goal Setting

## 2.1 From the tree view

Since goals have a hierarchical structure, its easier to add new goals from the tree view. You can also update the progress for your child goals from the tree view. Parent goal's progress is auto-calculated based on child goals.

The screenshot displays the 'Goal Tree' interface for a user named 'Frappe'. The interface includes a search bar at the top with the text 'Search or type a command (Ctrl + G)'. Below the search bar, there are filters for '22-23' and 'HR-EMP-00008', along with a 'Date Range' dropdown. The main content area shows a tree structure of goals for the employee 'HR-EMP-00008'. The tree is organized into four main categories: 'Redesign (Kristin Watson)' (Design), 'Development (Kristin Watson)' (Development), 'Documentation for new products (Kristin Watson)' (Documentation), and 'Quality Improvement (Kristin Watson)' (Quality). Each category contains a list of sub-goals with their respective progress bars. The 'Redesign' category has two sub-goals: 'Redesign Performance Module (Kristin Watson)' (Design) and 'Redesign websites (Kristin Watson)' (Design), both marked as 'In Progress'. The 'Development' category has two sub-goals: 'Recruitment Module (Kristin Watson)' (Development) marked as 'In Progress' and 'Performance Improvements in Payroll (Kristin Watson)' (Development) marked as 'Completed'. The 'Documentation' category has one sub-goal: 'Documentation for new products (Kristin Watson)' (Documentation) marked as 'In Progress'. The 'Quality Improvement' category has two sub-goals: 'Bring down Github Issues by 20% (Kristin Watson)' (Quality) marked as 'In Progress' and 'QA Testing (Kristin Watson)' (Quality) marked as 'Completed'. The overall progress for the employee is shown as '0 of 2 Completed'.

You can apply a filter for the Appraisal cycle and your Employee record. These fields will be picked up in the New Goal dialog.



## 2.2 From the list view

1. Go to the Goal list, and click on New.
2. Enter your goal. You can optionally add a detailed description of your goal.
3. You can break down your goals into sub-goals for better tracking. To do so, select the goal in the Parent Goal field. Ex: I have a goal called Quality Improvement aligned to the Quality KRA. I can add multiple goals under Quality Improvement like:
  - Bring down GitHub issues by 20%
  - Increase test converge by 30%
4. Mark the goal as Is Group if this goal is going to have sub-goals
5. Select the Employee.
6. Set the Start and End Dates for your goal.
7. If you want the goal's progress to impact your appraisal, select the Appraisal Cycle and tag the KRA for your goal. Now on updating the goal's progress the goal score linked to your KRA will be updated.

8. Save. The status of your goal is auto-updated based on the progress.

Employee Lifecycle

Goal

HR-GOAL-2023-0030

Search or type a command (Ctrl + G)

Help

A

Documentation for new products

In Progress

Archive

<

>

⊞

⋮

Save

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0

0

FOLLOW

Kristin Watson

edited this

2 days ago

Kristin Watson

created this

2 days ago

Goal \*

Documentation for new products

Is Group

Parent Goal

Progress

70.00

Status

In Progress

Employee \*

HR-EMP-00008: Kristin Watson

Employee Name

Kristin Watson

Company

Frappe

User

kristin@frappe.io

Start Date \*

01-03-2023

End Date

31-03-2023

Appraisal Linking

Link the cycle and tag KRA to your goal to update the appraisal's goal score based on the goal progress

Appraisal Cycle

22-23

KRA

Documentation

Employee Lifecycle

Goal

Search or type a command (Ctrl + G)

Help

A

Goal

List View

⋮

+ Add Goal

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

Filter Name

ID	Goal	Status	Employee	Start Date	Filter	Last Updated On
End Date	Appraisal Cycle					
<input type="checkbox"/>	Goal					12 of 12
<input type="checkbox"/>	♥ Add 85 Test Coverage	• Pending	<div></div>	Kristin Watson	in 3 days	HR-GOAL-202... 17 m 0
<input type="checkbox"/>	♥ Move Documentation	• Completed	<div></div>	Rucha Mahabal		HR-GOAL-202... 1 h 0
<input type="checkbox"/>	♥ Development	• In Progress	<div></div>	Kristin Watson	in a month	HR-GOAL-202... 1 h 0
<input type="checkbox"/>	♥ Performance Improver	• Completed	<div></div>	Kristin Watson		HR-GOAL-202... 1 h 0
<input type="checkbox"/>	♥ Recruitment Module	• In Progress	<div></div>	Kristin Watson	in 3 days	HR-GOAL-202... 1 h 0
<input type="checkbox"/>	♥ Quality Improvement	• In Progress	<div></div>	Kristin Watson	in 3 days	HR-GOAL-202... 1 h 0
<input type="checkbox"/>	♥ Bring down Github Iss	• In Progress	<div></div>	Kristin Watson	2 days ago	HR-GOAL-202... 1 h 0
<input type="checkbox"/>	♥ Redesign	• In Progress	<div></div>	Kristin Watson	in 3 days	HR-GOAL-202... 1 h 0
<input type="checkbox"/>	♥ Redesign websites	• In Progress	<div></div>	Kristin Watson	in 3 days	HR-GOAL-202... 1 h 0
<input type="checkbox"/>	♥ Redesign Performance	• In Progress	<div></div>	Kristin Watson	in 3 days	HR-GOAL-202... 1 h 0
<input type="checkbox"/>	♥ Documentation for nei	• In Progress	<div></div>	Kristin Watson	in 3 days	HR-GOAL-202... 1 h 0
<input type="checkbox"/>	♥ QA Testing	• Completed	<div></div>	Kristin Watson		HR-GOAL-202... 1 h 0



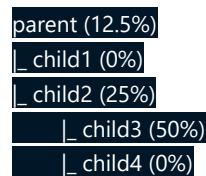
## 3. Features

### 3.1 Goal Progress Update

Whenever a child goal is updated, the parent's goal progress is also updated.

How does a goal's progress affect its parent?

Ex: progress for the goal `child2` is 25%: the average of its children (`child3` and `child4`) progress for the goal `parent` is 12.5%: the average of its children (`child1` and `child2`)



Whenever a goal is updated, the average goal completion against the KRA linked to that goal is also updated. Ex: In the screenshot below, the Development KRA has 30% weightage and the employee has completed 75% of the goals. So the goal score is 22.5 out of 30, and so on.

View Goals < > Print ... Save

**You** created this  
6 months ago

Sometimes you add a goal while planning but later on, you don't want to work on that goal anymore. In that case, you can archive the goal. Archived goal's progress won't contribute to the KRA/Goal score.

Employee Lifecycle > Goal > HR-GOAL-2023-0053

Search or type a command (Ctrl + G) | Help | A

**Add 85 Test Coverage** • Pending

Archive < > ⌂ ... Save

Assigned To: [User] +

Attachments: Attach File +

Reviews: +

Shared With: +

Tags: Add a tag ...

<b>Goal *</b> Add 85 Test Coverage <input type="checkbox"/> Is Group Parent Goal [Empty Field]	<b>Progress</b> 0.00 <b>Status</b> Pending
<b>Employee *</b> HR-EMP-00008: Kristin Watson <b>Employee Name</b> Kristin Watson	<b>Start Date *</b> 01-03-2023 <b>End Date</b> 31-03-2023

## 3.2 Close Goal

Closing goals will stop employees from making further progress updates but would still contribute to the KRA/Goal score, unlike Archived goals. You can close a goal by clicking the Status > Goal button on the Goal form

## 4. Related Topics

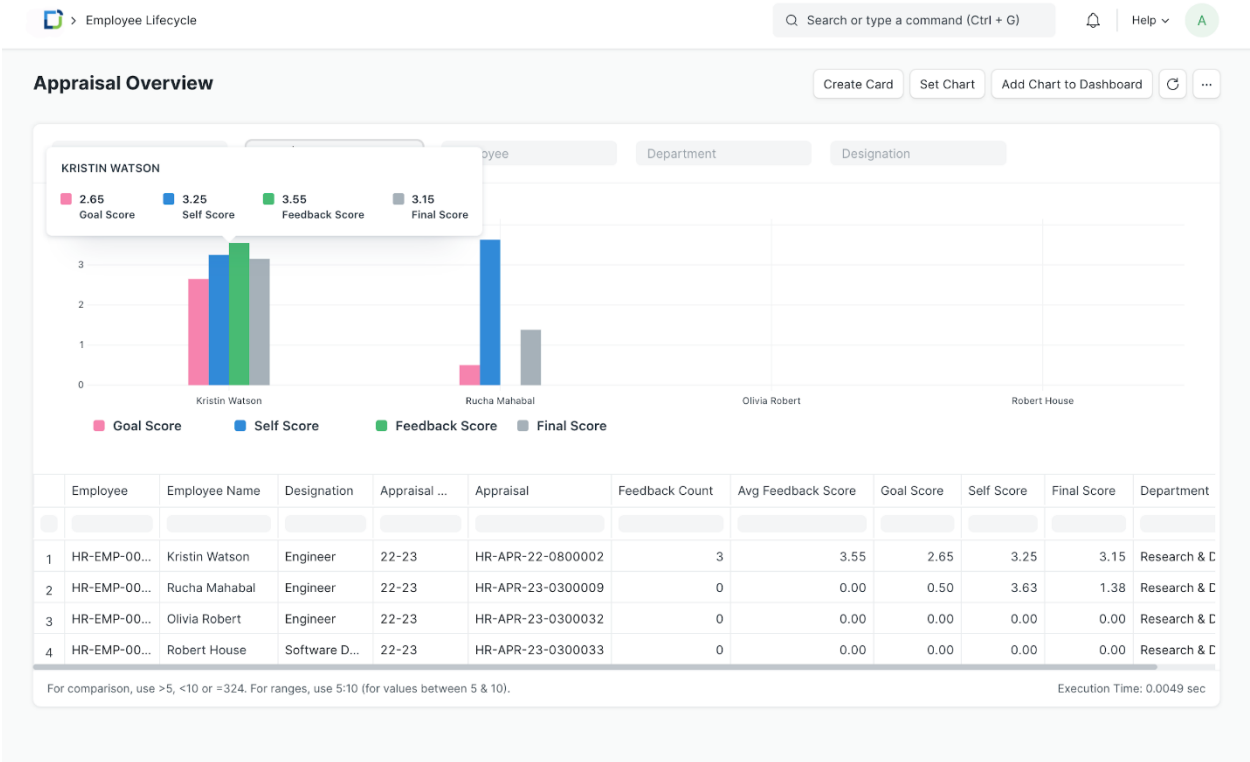
1. [Appraisal Cycle](#)
2. [Appraisal](#)

## Appraisal Overview Report

This report gives an overview of the Appraisals:

- Appraisal Cycle & Appraisal
- Feedback Count: Number of feedback documents created against the appraisal
- Goal Score: Goal completion score against KRA
- Avg Feedback Score: Avg of all the feedback scores received
- Self Score: Self Appraisal Score

- Final Score: Avg of Goal Score, Feedback Score, and Self Score



# Travel and Expense

# Employee Advance

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

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

To access Employee Advance, go to:


Human Resources > Expense Claims > Employee Advance

## 1. Prerequisites

1. Employee
2. Department
3. Chart of Accounts

## 2. How to create an Employee Advance

1. Go to: Employee Advance > New.
2. Select Employee to whom you need to give the advance.
3. Enter the Purpose and Advance Amount.
4. Under the Accounting section, select Mode of Payment. Advance Account will be fetched from the Default Employee Advance Account of your Company.
5. Save.


> HR > Employee Advance > HR-EAD-2024-00001

Help

Akash

Unpaid

Create

<

>

Print

More

Cancel

Assigned To

+

Attachments

+

Tags

+

Share

+

0

0

FOLLOW

You last edited this · just now

You created this · just now

Connections

▼

Employee \*

HR-EMP-00001: Akash

Posting Date \*

20-02-2024

Employee Name

Akash

Company \*

Frappe

Currency ▼

Purpose & Amount

Purpose \*

Travel

Advance Amount \*

₹ 5,000.00

Paid Amount

₹ 0.00

Pending Amount

₹ 0.00

Claimed Amount

₹ 0.00

Returned Amount

₹ 0.00

Accounting

Advance Account \*

Bank Account - F

Mode of Payment

Cash

☐ Repay Unclaimed Amount from Salary

More Info ^

Status

Unpaid

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

## 2.1 Statuses

These are the statuses that are automatically set for Employee Advance.

- Draft: A draft is saved but yet to be submitted.
- Paid: Advance has been Paid to the employee and a Payment Entry has been submitted.

- Unpaid: Advance is not paid out to the employee yet. A Payment Entry is not created against the advance.
- Claimed: After the advance is paid, the employee has claimed the entire *Paid Amount* via Expense Claim.
- Returned: After the advance is paid, the employee has returned the entire *Paid Amount* and a return entry is submitted via Payment Entry/Journal Entry.
- Partly Claimed and Returned: After the advance is paid, the employee has partially claimed the *Paid Amount* via Expense Claim and returned the remaining amount via a submitted Payment Entry/Journal Entry.
- Cancelled: The Advance is cancelled due to any reason.

## 3. Features

### 3.1 Employee Advance Submission

Employee Advance record can be created by any Employee but they cannot submit the record.

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

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

### 3.2 Make Payment Entry

#### Employee Advance via Payment Entry

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



The Payment Entry will look like following:

HR-EMP-00001

Submitted

Ledger<>⌂⋮Cancel

Assigned To+

Attachments+

Tags+

Share+

0 · 0 · 0

FOLLOW

You last edited this · just now

You created this · 2 minutes ago

Connections

Type of Payment

Payment Type \*Pay

Posting Date \*20-02-2024

Mode of PaymentCash

Payment From / To

PartyHR-EMP-00001

Party NameAkash

Accounts

Amount

Paid Amount (INR) \*₹ 5,000.00

Reference

Payment References

<input type="checkbox"/>	No.	Type *	Name *	Grand Total (INR)	Outstanding (INR)	Allocated (INR)	⚙
<input type="checkbox"/>	1	Employee Advance	HR-EAD-2024-00001	5,000	5,000	5,000	Edit

Writeoff

Total Allocated Amount (INR)₹ 5,000.00

Unallocated Amount (INR)₹ 0.00

Difference Amount (INR)₹ 0.00

Total Taxes and Charges (INR)₹ 0.00

Transaction ID

Cheque/Reference No \*524000

Cheque/Reference Date \*20-02-2024

More Information

## Employee Advance Payment via Journal Entry

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

New Journal Entry 1

Editing Row #2

Insert Below

Insert Above

Duplicate

Move

ave

Account

Creditors - UP

Account Balance

₹ 7,900.00 Dr

Bank Account No

Party Type

Employee

Party

HR-EMP-00001

ACCOUNTING DIMENSIONS

AMOUNT

Debit

5,000.00

Credit

REFERENCE

Reference Type

Employee Advance

Reference Name

HR-EAD-2019-00002

Reference Due Date

Project

Is Advance

Yes

User Remark

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

Accounting > Journal Entry

Search or type a command (Ctrl + G)

Settings Help 16

Cash - UP Journal Entry

ACC-JV-2019-00003 Menu Cancel

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

You edited this a few seconds ago

You created this a few seconds ago

View Make

Entry Type

Journal Entry

Posting Date

19-08-2019

Company

Unico Plastics Inc.

Accounting Entries

	Account	Party	Debit	Credit	
<input type="checkbox"/>	1 Cash - UP		₹ 0.00	₹ 5,000.00	
<input type="checkbox"/>	2 Creditors - UP	HR-EMP-00001	₹ 5,000.00	₹ 0.00	

Total Debit

₹ 5,000.00

Total Credit

₹ 5,000.00

☐ Multi Currency

## Employee Advance is Paid

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

## 3.3 Adjust Advances on Expense Claim

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

## 3.4 Return Amount

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

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

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

- If amount is unused, click on the Return button to return the paid Advance amount

The screenshot shows the 'Employee Advance' form for HR-EAD-2020-00003, which is in a 'Submitted' state. On the left sidebar, there are sections for Comments, Assigned To, Attachments, Tags, Reviews, and Shared With. The main form area includes fields for Employee (HR-EMP-00005: George Smith), Posting Date (21-01-2020), Employee Name (George Smith), Purpose (Research and Development), Advance Amount (₹ 17,500.00), and Paid Amount (₹ 17,500.00). A dropdown menu is open, showing 'Expense Claim' and 'Return', with the 'Return' option highlighted by a red rectangular box.

- If all of the advance is used, it will reflect in the Claimed Amount field
- If only some amount is claimed and rest is returned, the returned amount will be shown in the 'Returned Amount' field.

This screenshot shows the same Employee Advance form, but with additional fields visible on the right side: Due Advance Amount (₹ 0.00), Claimed Amount (₹ 12,500.00), and Returned Amount (₹ 5,000.00). The 'Returned Amount' field is highlighted with a red rectangular box. The left sidebar now includes a 'Reviews' section with a plus icon, a 'Shared With' section with a plus icon, and a heart icon. Below these, it shows activity logs: 'You edited this a minute ago' and 'You created this 17 minutes ago'.

## 4. Related Topics

1. [Expense Claim](#)

# Expense Claim

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

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

To access an Expense Claim, go to:

Human Resources > Expense Claims > Expense Claim

## 1. Prerequisites

1. Employee
2. Department
3. Chart of Accounts

## 2. How to create a Expense Claim

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

>

HR

>

Expense Claim

>

new-expense-claim-3

Q Search or type a command (Ctrl + G)

Help

New Expense Claim

Not Saved

Save

Series \*

HR-EXP-.YYYY.-

Expense Approver

bruce@erpnext.com

From Employee \*

HR-EMP-00005

Approval Status

Approved

Employee Name

Michelle D'souza

Is Paid

Expenses

<input type="checkbox"/> No.	Expense Date	Expense Claim Type	Description	Amount	Sanctioned Amount	
<input type="checkbox"/> 1	01-05-2021	Medical	medical expenses	1,000.00	1000	<a href="#">Edit</a>

Add Row

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

>

HR

>

Expense Claim

>

new-expense-claim-3

Q Search or type a command (Ctrl + G)

Help

New Expense Claim

Not Saved

Save

Expenses

<input type="checkbox"/> No.	Expense Date	Expense Claim Type	Description	Amount	Sanctioned Amount	
<input type="checkbox"/> 1	01-05-2021	Medical	medical expenses	₹ 1,000.00	₹ 1,000.00	<a href="#">Edit</a>

Add Row

Expense Taxes and Charges

<input type="checkbox"/> No.	Account Head	Rate	Amount	Total	
<input type="checkbox"/> 1	CGST - UP	9	₹ 90.00	₹ 1,090.00	<a href="#">Edit</a>
<input type="checkbox"/> 2	IGST - UP →	18.000	180.00	1,180.00	<a href="#">Edit</a>

Add Row

Total Sanctioned Amount

₹ 1,000.00

Grand Total

₹ 1,270.00

Total Taxes and Charges

₹ 270.00

Total Claimed Amount

₹ 1,000.00

Expense claim workflow

## Approving Expenses

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

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

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

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

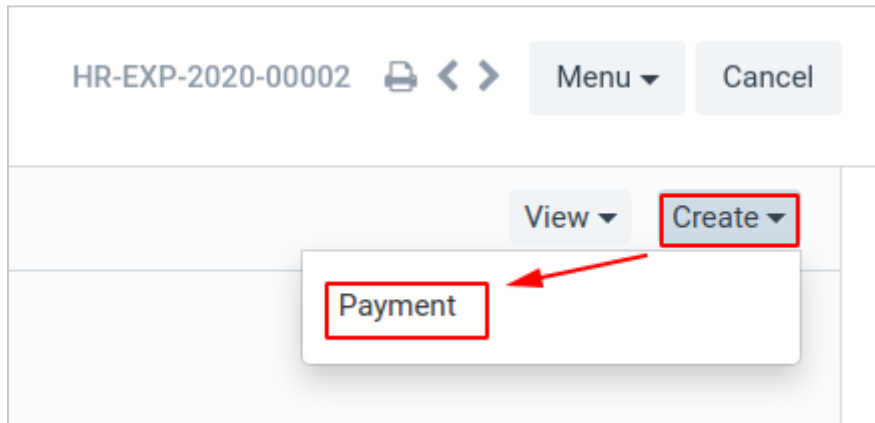
User can view unpaid expense claim using report "Unclaimed Expense Claims"

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 Create > Payment.

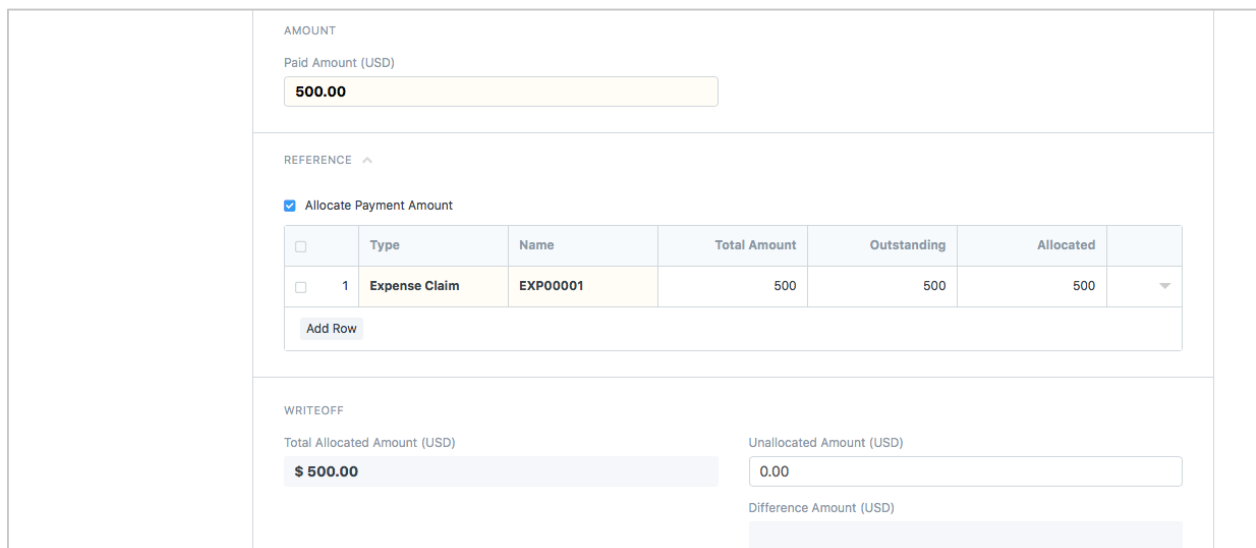
### Expense Claim



The screenshot shows the top of an expense claim form. At the top left is the claim ID 'HR-EXP-2020-00002' followed by a printer icon and navigation arrows. To the right are 'Menu' and 'Cancel' buttons. Below these is a 'View' dropdown and a 'Create' dropdown. The 'Create' dropdown is open, showing a 'Payment' option which is highlighted with a red box. A red arrow points from the 'Create' dropdown to the 'Payment' option.

### Payment Entry

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



The screenshot shows the 'Payment Entry' form. It has three main sections: 'AMOUNT', 'REFERENCE', and 'WRITEOFF'.  
1. **AMOUNT**: 'Paid Amount (USD)' is set to 500.00.  
2. **REFERENCE**: The 'Allocate Payment Amount' checkbox is checked. Below it is a table:

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

An 'Add Row' button is below the table.  
3. **WRITEOFF**: 'Total Allocated Amount (USD)' is \$ 500.00. 'Unallocated Amount (USD)' is 0.00. 'Difference Amount (USD)' is empty.

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



Accounting > Payment Entry > New Payment Entry

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

## Linking with Task & Project

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

The screenshot displays the 'New Expense Claim' form in a software application. The form is titled 'New Expense Claim' with a 'Not Saved' status and a 'Save' button. The form is divided into several sections:

- Total Sanctioned Amount:** ₹ 270.00
- Total Claimed Amount:** ₹ 270.00
- Posting Date:** 10-05-2021
- Task:** Design new sliding door wardrobe. A dropdown menu is open, showing 'TASK-2021-00006' and 'Design new sliding door wardrobe'. Below the dropdown, it says 'Filters applied for Project = PROJ-0001' and provides options to '+ Create a new Task' and 'Advanced Search'.
- Remark:** (Empty text area)
- Payable Account:** Creditors - UP
- Clearance Date:** 31-05-2021
- Accounting Dimensions:**
  - Project:** PROJ-0001
  - Cost Center:** Main - UP

This will update the Project cost with the Expense claim amounts

Projects > Project

Search or type a command (Ctrl + G)

Michael Corleone

Help

10

Design New Sliding Door Wardrobe • Not Saved

START AND END DATES

COSTING AND BILLING

Estimated Cost

56,000.00

Total Costing Amount (via Timesheets)

Total Expense Claim (via Expense Claims)

\$ 270.00

Total Purchase Cost (via Purchase Invoice)

Company

Woodcraft Decors

Total Sales Amount (via Sales Order)

Total Billable Amount (via Timesheets)

Total Billed Amount (via Sales Invoices)

Total Consumed Material Cost (via Stock Entry)

Default Cost Center

MARGIN

## 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

HR > Travel Request > HR-TRQ-2023-00001

Search or type a command (Ctrl + G)

Help

A

Mohan Rai

Submitted

<

>

Print

More

Cancel

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0

0

FOLLOW

You edited this just now

You created this 1 minute ago

Travel Type \*

Domestic

Purpose of Travel \*

Conference

Travel Funding

Require Full Funding

Employee Details

Travel Itinerary

	No.	Travel From	Travel To	Mode of Travel	Departure Datetime	
<input type="checkbox"/>	1	Mumbai	Delhi	Flight	01-05-2023 20:30:00	Edit
<input type="checkbox"/>	2	Delhi	Mumbai	Train	01-06-2023 20:30:00	Edit

Costing Details

Costing

	No.	Expense Type	Sponsored Amount	Funded Amount	Total Amount	
<input type="checkbox"/>	1	Travel	₹ 5,000.00	₹ 5,000.00	₹ 5,000.00	Edit

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 from the company.

Editing Row #1

Insert Below

Insert Above

Travel From	Departure Datetime
<div>Zurich</div>	<div>25-10-2018 18:00:00</div>
Travel To	Arrival Datetime
<div>Mumbai</div>	<div>26-07-2018 09:00:00</div>
Mode of Travel	<div><input checked="" type="checkbox"/> Lodging Required</div>
Meal Preference	Preferred Area for Lodging
<div>Vegetarian</div>	<div>Matunga</div>
<div><input checked="" type="checkbox"/> Travel Advance Required</div>	Check-in Date
Advance Amount	<div>26-10-2018</div>
<div>2000</div>	Check-out Date
	<div>28-10-2018</div>

Other Details

# Recruitment

# Recruitment

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

## Staffing Plan

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

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

To access Staffing, go to:

Home > Human Resources > Recruitment > Staffing Plan

### 1. Prerequisites

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

- [Department](#)
- [Designation](#)

### 2. How to create a Staffing Plan

1. Go to Staffing Plan list, click on New.

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

HR > Staffing Plan > Staffing Plan 2021-22

Search or type a command (Ctrl + G)

**Staffing Plan 2021-22**
Submitted

<
>
Print
...
Cancel

Reviews

+

Shared With

+

Tags

Add a tag ...

0

0

0

0

0

0

0

0

0

0

0

0

You edited this

1 week ago

You created this

1 week ago

Staffing Plan Details

Staffing Plan Detail

No.	Designation	Vacancies	Estimated Cost Per P...	Total Estimated Cost	Number Of Positions	
1	Engineer	10	₹ 50,000.00	₹ 5,00,000.00	10	Edit
2	Researcher	5	₹ 75,000.00	₹ 3,75,000.00	5	Edit
3	Software Developer	7	₹ 40,000.00	₹ 2,80,000.00	7	Edit

Add Row

Total Estimated Budget

₹ 11,55,000.00

## 3. Features

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

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

- 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 #1 ▲

Designation	Current Count
Software Developer	0
Vacancies	Current Openings
5	0
Estimated Cost Per Position	Number Of Positions
₹ 1,00,000.00	5
Total Estimated Cost	
₹ 5,00,000.00	

⌨ - Ctrl + Up, Ctrl + Down, ESC
Insert Below

\* 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.

## Job Requisition

Job Requisition is an internal document raised to request a new hire. These requisitions are then converted to Job Openings or considered for budgeting while making the Staffing Plan.

To access Job Requisition, go to:

Home > Human Resources > Recruitment > Job Requisition

### 1. Prerequisites

Before creating a Job Requisition, you should create the following:

- Designation
- Department (Optional)

## 2. How to create a Job Requisition

1. Go to the Job Requisition list, and click on New.
2. Enter the Designation you want to place the request for.
3. Enter the No of Positions, Expected Compensation, Company, and Department (optional).
4. Select the employee who is applying for the requisition in the Requested By field.
5. Optionally, you can set the Expected By date.
6. The Job Description will be fetched from the Designation. If you want to add additional information for the opening, you can do so here.
7. Save.
8. By default, the status will be Pending. You can set up workflows to change the status to Open & Approved.

Employee Lifecycle > Job Requisition > HR-HIREQ-00003

Search or type a command (Ctrl + G)

Help

Business Development Manager
Open & Approved

Assigned To  
+

Attachments  
Attach File +

Reviews  
+

Shared With  
+

Tags  
Add a tag ...

0 0 FOLLOW

You edited this  
6 days ago  
Rucha Mahabab created this  
4 months ago

1 Employee Referral open for this position.

Details
Job Description
Connections

Designation \*  
Business Development Manager

No of. Positions \*  
5

Company \*  
Frappe

Department  
Customer Service

Expected Compensation \*  
5,00,000.00

Status \*  
Open & Approved

Requested By

Requested By \*  
HR-EMP-00001

Department  
Research & Development

Requested By (Name)  
Rucha Mahabab

Designation  
Engineer

Timelines

Posting Date \*  
12-09-2022

Expected By  
31-10-2022

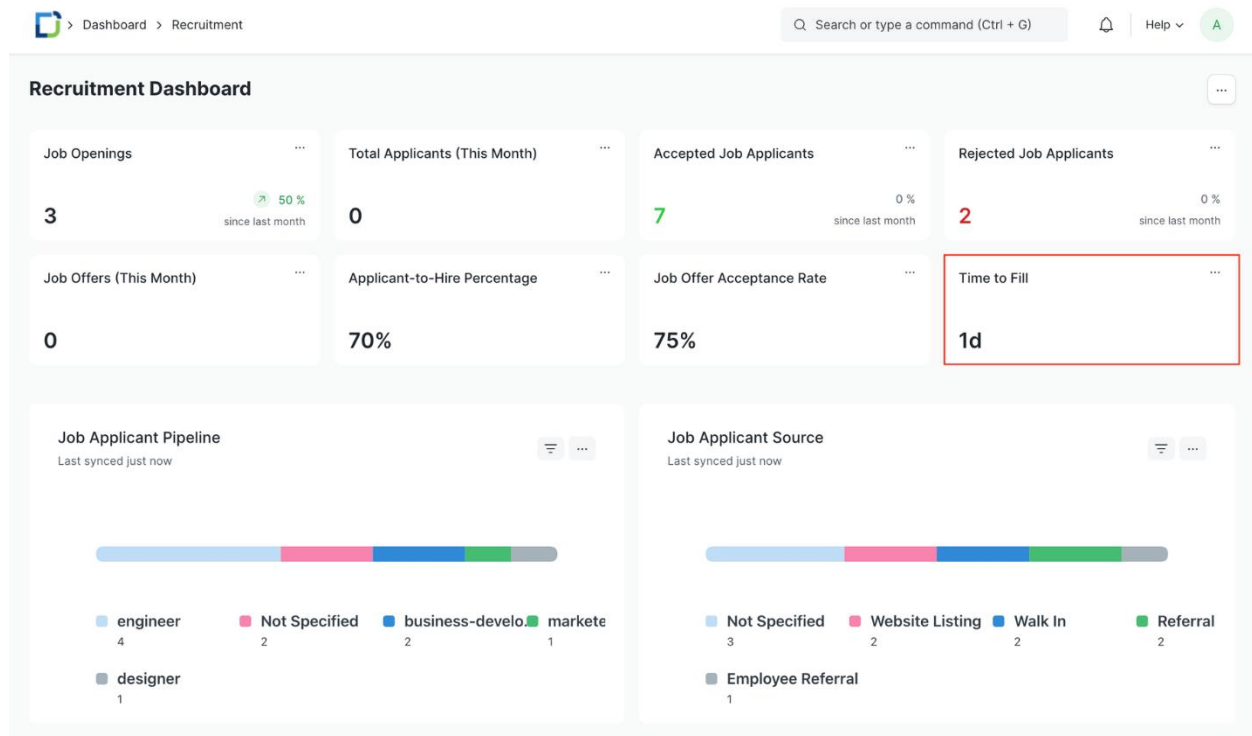
Actions
Create Job Opening
Associate Job Opening

Save









## Job Opening

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

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

Note: Make sure the "Check Vacancies On Job Offer Creation" checkbox is checked in the Hiring Settings section of the HR Settings.

To access Job Opening, go to:

Home > Human Resource > Recruitment > Job Opening

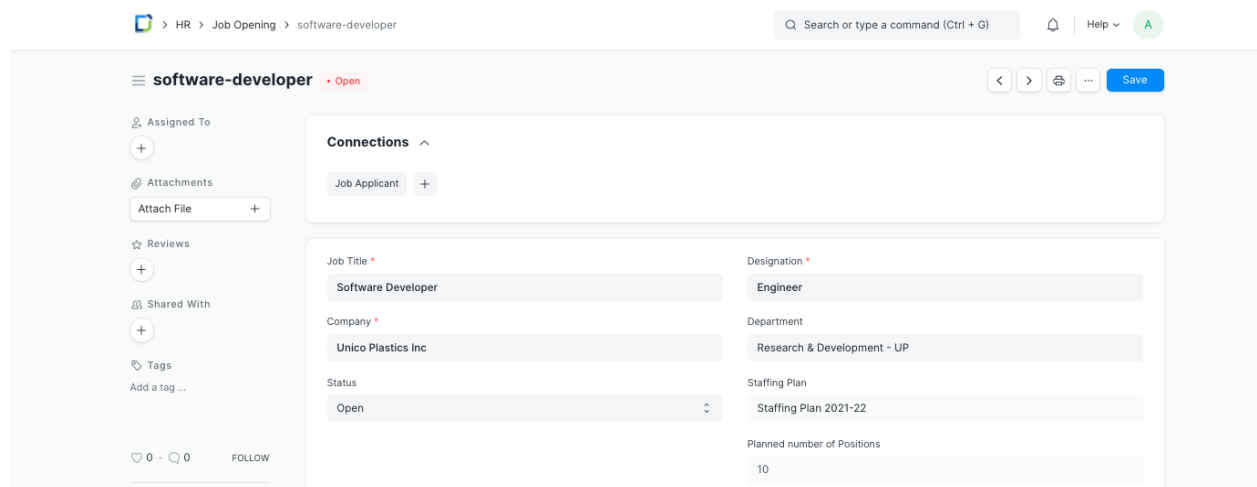
# 1. Prerequisites

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

- [Staffing Plan](#)
- [Department](#)

## 2. How to create a Job Opening

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



The screenshot shows the 'software-developer' Job Opening form. The breadcrumb navigation at the top reads '> HR > Job Opening > software-developer'. A search bar contains 'Search or type a command (Ctrl + G)'. The left sidebar lists actions: 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews', 'Shared With', 'Tags', and 'Add a tag ...'. The main form area has a 'Connections' section with a 'Job Applicant' button. Below this, the form fields are organized into two columns: 'Job Title' (Software Developer), 'Designation' (Engineer), 'Company' (Unico Plastics Inc), 'Department' (Research & Development - UP), 'Status' (Open), and 'Staffing Plan' (Staffing Plan 2021-22). The 'Planned number of Positions' is set to 10. A 'Save' button is in the top right corner.

Once the Job Opening is saved, you can directly create a new [Job Applicant](#) from the dashboard.

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

## 3. Features

### 3.1 Job Portal

You can enable 'Publish on website' to publish a Job Opening to the [Job Portal](#). This will make it possible for users to view and apply to these openings from your site.

<input checked="" type="checkbox"/> Publish on website	Job Application Route
Route	
jobs/frappe/technical-trainer	Route to the custom Job Application Webform

## Job Portal

The Job Portal provides an interface for applicants to browse and apply to published Job Openings.

## 1. Prerequisites

Before using the Job Portal, it is advisable you create the following:

- [Job Opening](#)

Note: For an opening to be visible on the Job Portal, you must enable the 'Publish on website' field for that specific Job Opening.

## 2. How to Apply Using the Job Portal

1. To visit the Job Portal, go to <https:///jobs>. For example, if my site name is <https://DellSuiteio.DellSuite.cloud>, the Job Portal can be accessed from <https://DellSuiteio.DellSuite.cloud/jobs>

Home
A

My Account > Jobs

## Job Openings

Filters
Clear All

≡
Posting Date

**Company**
☐ Frappe

**Department**
☐ Marketing
☐ Purchase
☐ Research & Development
☐ Sales

**Location**
☐ Amsterdam, Netherlands
☐ Los Angeles, CA
☐ Remote
☐ Remote - United States

**Employment Type**
☐ Contract
☐ Full-time
☐ Intern

Showing 5 results

**Product Engineer**

Full-time

Frappe · 3 days ago

Remote
Purchase
\$ 80,000 - \$ 1,20,000 / year

Applications received: 2
Closes on: 8 Dec, 2023

**Client Account Manager**

Contract

Frappe · 3 days ago

Amsterdam, Netherlands
Sales
₹ 1,80,000 - ₹ 2,40,000 / month

Applications received: 0
Closes on: 1 Dec, 2023

**Group Product Manager**

Intern

Frappe · 3 days ago

Remote - United States
Marketing
₹ 10,00,000 / month

Applications received: 0
Closes on: 3 Nov, 2023

**Head of Ads Business Develo...**

Full-time

Frappe · 3 days ago

Los Angeles, CA
Marketing
₹ 2,50,000 / month

Applications received: 0
Closes on: 16 Dec, 2023

**Director of Engineering, Machi...**

Full-time

Frappe · 2 minutes ago

Remote - United States
Research & Development
₹ 98,76,54,321 / year

Applications received: 0
Closes on: 24 Nov, 2023

2. You can use the search bar to search for jobs by title or description. You can also filter jobs by company, department, location, or employment type, and sort them by the latest or oldest posting date. 3. Click on a job card to view it in detail.

Home


A


All Jobs > Technical Trainer


# Technical Trainer


Apply Now


Frappe · 1 hour ago


 Location  
**Mumbai**

 Department  
**Human Resources**

 Salary Range  
**₹ 8,00,000 - ₹ 12,00,000 / year**

 Employment Type  
**Full-time**

 Applications Received  
**1**

 Closes On  
**31 Dec, 2023**

### What you will be working on:

- Driving Frappe Framework Certification cohorts/batches for Frappe School
- Planning, Organising and Conducting live training (either online or on-site)
- Conducting 1-on-1 evaluations for granting certificates
- Being active on our [community forum](#) and answering questions.
- Occasionally, creating and sharing educational content like blog posts, social media posts etc.
- Staying upto date with [Frappe Framework](#), [FrappeUI](#) and other Frappeverse products, and coming up with new ideas for content, batches, courses, etc.

### What we are looking for:

- You should be passionate about teaching, interacting with the community and coming up with new ideas to explain concepts better.
- Someone with good technical knowledge of Python, SQL and JavaScript.
- Atleast 1 year of professional experience in the field of web development.
- Strong communication and collaboration skills.
- Prior teaching experience will be a plus

4. Click on the 'Apply Now' button at the top-right corner. This will open a web form where applicants can enter their details.

# Job Application

● Not Saved

Job Opening

HR-OPN-2023-00004

Applicant Name \*

Job Steves

Email Address \*

jobsteves@example.com

Phone Number

+91 8967452301

Country of Residence

India

Cover Letter

Resume Link

https://drive.google.com/drive/u/0/home

## Expected Salary Range per month

Currency

Lower Range

0.00

Upper Range

0.00

Discard

Submit



5. Fill in the appropriate details and click on Submit. This will result in the creation of the corresponding Job Applicant document.

The screenshot shows a web interface for creating a Job Applicant. At the top, there's a header with a hamburger menu, the text 'Job Steves' with a red 'Open' tag, and a toolbar with 'Create', navigation arrows, a print icon, and a 'Save' button. On the left, a sidebar contains icons for 'Assigned To', 'Attachments', 'Tags', and 'Share', each with a plus sign. Below these are social media-like icons for a heart, comment, and 'FOLLOW' button. The main content area is titled 'Connections' and 'Interview Summary'. Under 'Details', there are two columns of form fields. The left column includes 'Applicant Name' (filled with 'Job Steves'), 'Email Address' (filled with 'jobsteves@example.com'), 'Phone Number' (filled with '+91 8967452301'), and 'Country' (filled with 'India'). The right column includes 'Job Opening' (filled with 'HR-OPN-2023-00004'), 'Designation' (empty), and 'Status' (a dropdown menu currently showing 'Open'). At the bottom left of the sidebar, there are two status messages: 'You last edited this · 22 minutes ago' and 'You created this · 22 minutes ago'.

## Job Applicant

A Job Applicant is a person who applies for a job in your Company against a particular Job Opening.

In DellSuite HR, you can maintain a list of people who have applied against a particular Job Opening.

To create a Job Applicant, go to:

Home > Human Resource > Recruitment > Job Applicant

### 1. Prerequisites

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

- Staffing Plan
- Department
- Job Opening

## 2. How to Create a Job Applicant

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

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

The screenshot shows a web application interface for creating a job applicant. The breadcrumb trail at the top reads: HR > Job Applicant > Jane Doe - janedoe@example.com - software-developer. A search bar and a 'Help' link are also visible. The main form is titled 'Jane Doe' with an 'Open' status. On the left, there are sections for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews', 'Shared With', and 'Tags'. The main form area contains a 'Connections' section with 'Employee' and 'Job Offer' links. Below this, the form fields are organized into two columns: 'Applicant Name' (Jane Doe), 'Email Address' (janedoe@example.com), 'Phone Number', 'Country' (India), and 'Status' (Open) on the left; and 'Job Opening' (software-developer), 'Source' (Employee Referral), 'Source Name' (HR-EMP-00001), and 'Applicant Rating' (5 stars) on the right. A 'Save' button is located at the top right of the form.

## 3. Features

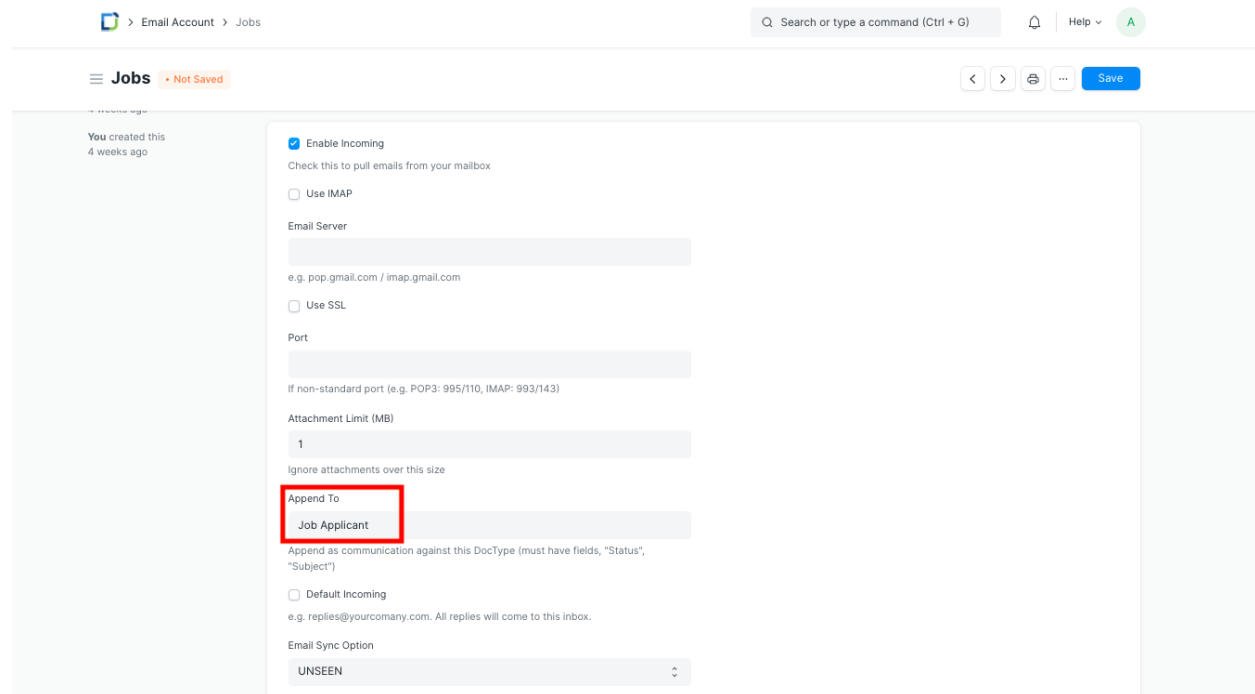
### 3.1 Linking with an Email Account

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

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

## Settings > Email Account > New Email Account

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



Settings > Email Account > Jobs

Search or type a command (Ctrl + G) | Help

**Jobs** • Not Saved

You created this 4 weeks ago

☒ Enable Incoming  
Check this to pull emails from your mailbox

☐ Use IMAP

Email Server  
e.g. pop.gmail.com / imap.gmail.com

☐ Use SSL

Port  
If non-standard port (e.g. POP3: 995/110, IMAP: 993/143)

Attachment Limit (MB)  
1  
Ignore attachments over this size

Append To  
**Job Applicant**

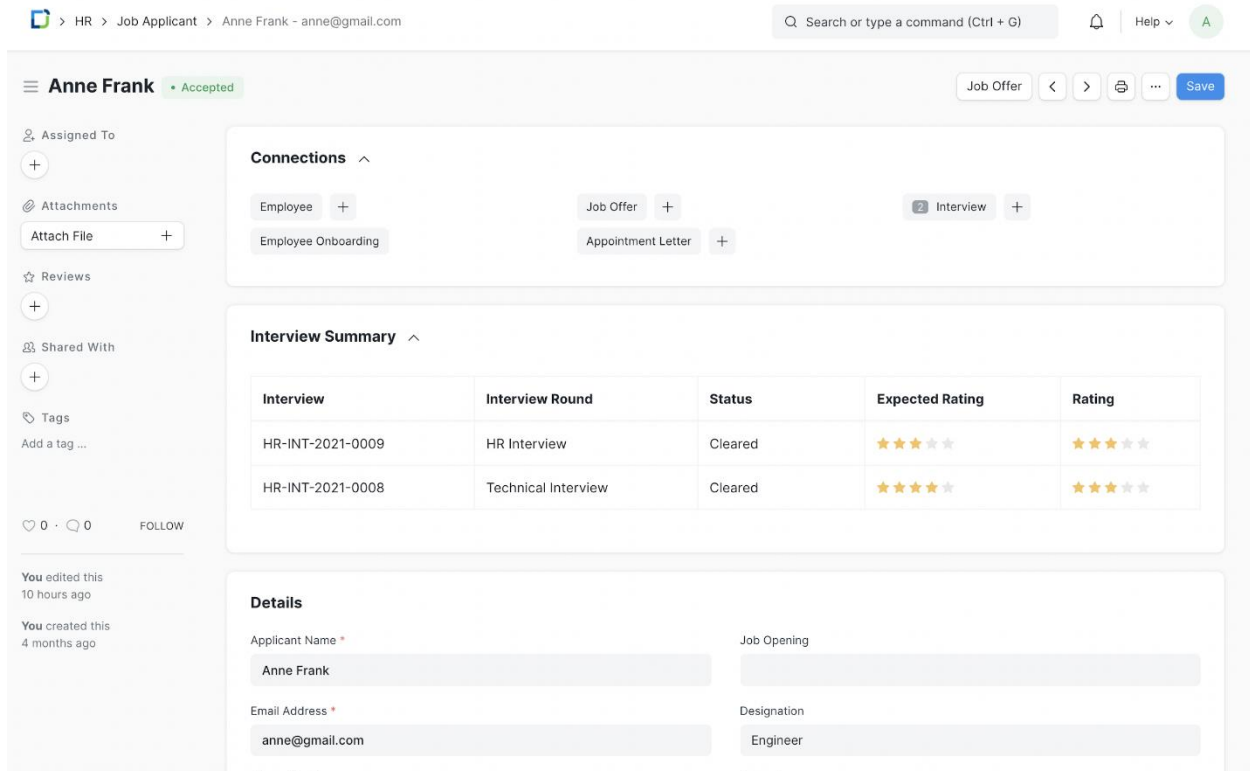
Append as communication against this DocType (must have fields, "Status", "Subject")

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

Email Sync Option  
UNSEEN

## 3.2 Tracking Interviews

After creating Interviews, you can easily track them within the Job Applicant dashboard. This enables you to compare all the interviews conducted with the applicant and evaluate their overall performance to make an acceptance decision.



## Interview Management

DellSuite HR makes it easy to manage and track multiple interview rounds for job applicants interested in joining your company.

Using this sub-module, you can:

1. Define Interview Types (optional)
2. Set up Interview Rounds
3. Create Interviews
4. Fill out Interview Feedbacks

## Interview Type

Interview type refers to the various types of interviews conducted by an organization, such as panel interviews, walk-in interviews, etc.

Interview Types can be used to specify the type of interview for a particular Interview Round.

To access Interview Type, go to:

Home > Human Resources > Recruitment > Interview Type

## 1. How to Create an Interview Type

1. Click on Add Interview Type.
2. Enter the Name and Description
3. Save

The screenshot shows a web interface for creating an interview type. At the top, a breadcrumb trail reads 'HR > Interview Type > Panel Interview'. A search bar and user profile are on the right. The main title 'Panel Interview' is on the left. Below it, a sidebar contains sections for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews', 'Shared With', and 'Tags'. The main content area has a 'Connections' section with one item, 'Interview Round', and a 'Description' section with a text area containing the text: 'Panel interview refers to a type of interview which includes one applicant and several interviewers, often representatives of different departments within a company like the hiring manager and a member of the human resource recruitment team.' At the bottom left, there are icons for likes and comments, and a 'FOLLOW' button. A status bar at the very bottom indicates 'You edited this 10 hours ago' and 'You created this'.

HR > Interview Type > Panel Interview

Search or type a command (Ctrl + G) Help A

### Panel Interview

Assigned To

Attachments

Attach File

Reviews

Shared With

Tags

Add a tag ...

0 0 FOLLOW

You edited this 10 hours ago

You created this

#### Connections

2 Interview Round

#### Description

Panel interview refers to a type of interview which includes one applicant and several interviewers, often representatives of different departments within a company like the hiring manager and a member of the human resource recruitment team.

## Interview Round

Interview rounds are a series of interviews that a candidate goes through during the recruitment process. For example, technical interviews, HR interviews, etc.

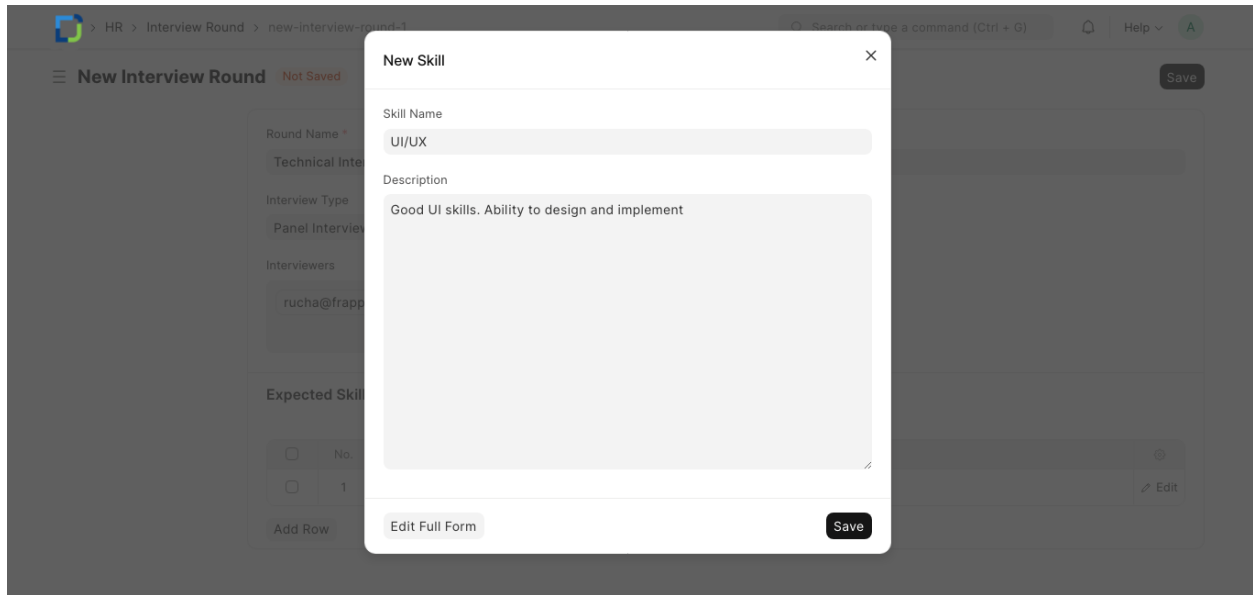
The Interview Round doctype enables you to define and set up these rounds for future [Interviews](#).

To access Interview Round, go to:

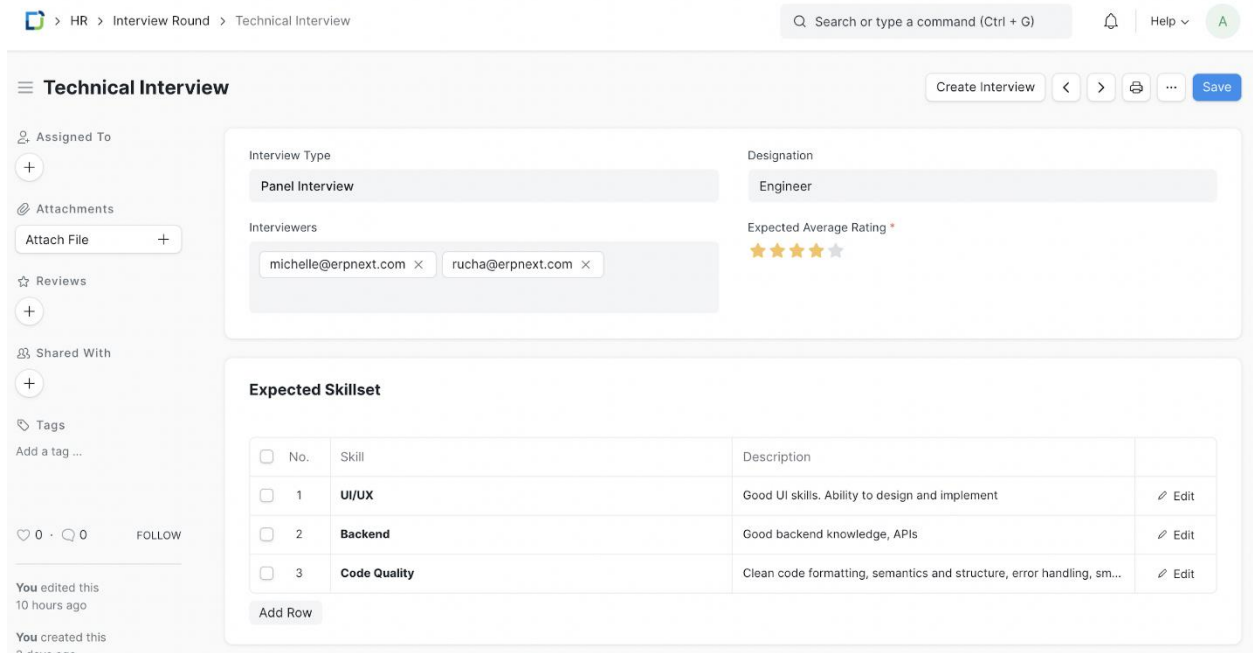
Home > Human Resources > Recruitment > Interview Round

## 1. How to create an Interview Round

1. From the Interview Round list, click on Add Interview Round.
2. Enter the Round Name.
3. Enter the Interview Type and the Expected Average Rating (optional).
4. You can assign Interviewers, authorizing them to provide feedback for upcoming Interviews of this round.
5. You can also enter Designation to filter Job Applicants during Interview creation.
6. Fill in the Expected Skillset table by clicking on Skill and creating Skills as shown below.



## 7. Save



After saving the Interview Round, you can [Create Interviews](#) directly from the dashboard. The assigned Interviewers can then provide [Feedback](#) for the created Interviews.

## Interview

Interviews are formal meetings between Job Applicants and Interviewers to assess whether the former is suitable for the Job Opening they're applying for.

DellSuite HR allows you to maintain a record of all Interviews conducted with Job Applicants.

To access Interview, go to:

Home > Human Resources > Recruitment > Interview

## 1. Prerequisites

Before creating an Interview, it is advisable you create the following:

- [Interview Round](#)
- [Job Applicant](#)

## 2. How to Create an Interview

1. Go to Interview list, click on Add Interview.
2. First select the Interview Round and then Job Applicant. Order is important.
3. Enter the date (Scheduled On) and time (From Time & To Time).
4. Enter the Resume Link (optional).
5. Click on Save.



HR > Interview > HR-INT-2023-0001

Search or type a command (Ctrl + G)

Help

ron@gmail.com Pending

Reschedule Interview

Submit Feedback

<

>

...

Submit

Assigned To

Add Assignee

Attachments

Add File

Tags

Add Tags

Shared With

Invite

0 · 0 · FOLLOW

You last edited this · 4 minutes ago

You created this · 1 week ago

Submit this document to confirm

Details

Feedback

Connections

Details

Interview Round \*  
Technical Round

Job Applicant \*  
ron@gmail.com

Job Opening  
product-engineer

Designation  
Engineer

Resume link  
https://puginarug.com/

Status \*  
Pending

Scheduled On \*  
28-09-2023

From Time \*  
11:00:00

To Time \*  
12:00:00

Interview Summary

After saving the Interview, you can reschedule the interview using the Reschedule Interview button.

You can also directly [Submit Feedback](#) from the dashboard.

Note: Only Interviewers associated with the selected [Interview Round](#) can submit Feedback.

## 3. Features

### 3.1 Calendar View

Scheduled interviews can be viewed in a color-coded calendar format by going to the Interview list, clicking on List View, and selecting Calendar.

Filter Last Modified On Calendar View + Add Interview

[Show Saved](#)

5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
			HR-INT-2021-0010 Olivia House - olivia@hr Technical Interview 1p - 2p	HR-INT-2021-0012 Robert House - robert@hr HR Interview 9a - 9:30a  HR-INT-2021-0011 Robert House - robert@hr Technical Interview 10a - 11a  HR-INT-2021-0008 Anne Frank - anne@hr Technical Interview 3p - 4p  HR-INT-2021-0009 Anne Frank - anne@hr HR Interview 5p - 5:30p		
3	4	5	6	7	8	9

Select or drag across time slots to create a new event.

Hide Weekends

v:8001/app

After an interview has received Feedback, you can click on the Feedback tab to access a summary of the feedback. This summary includes the overall average rating, the distribution of ratings for each Feedback, the average rating for each Skill, and the individual Feedback comments.

HR > Interview > HR-INT-2023-0001

Search or type a command (Ctrl + G)

Help

ron@gmail.com

Pending

Reschedule Interview

Submit Feedback

<

>

...

Submit

Assigned To

Add Assignee

Attachments

Add File

Tags

Add Tags

Shared With

Invite

0 · 0

FOLLOW

You last edited this · 2 minutes ago

You created this · 2 weeks ago

Submit this document to confirm

Details

Feedback

Overall Average Rating

Average Rating

3.75

based on 3 reviews

☆ 5

0%

☆ 4

33.3%

☆ 3

66.7%

☆ 2

0%

☆ 1

0%

Feedback Summary

Average rating of demonstrated skills

4.33

HTML/CSS

3.83

JavaScript

4

Problem-solving

3.67

Python

2.83

SQL

a

Akash Tom

HR Manager

★★★★☆

(3.9)

4 minutes ago

I was thoroughly impressed with the performance of the candidate during the technical interview round for the Product Engineer position. Their depth of technical knowledge and problem-solving skills are truly exceptional. Their ability to articulate complex concepts with clarity and precision is commendable, and their passion for the field is evident. I believe they would be a valuable addition to our team, and I look forward to seeing the innovative contributions they can make as a Product Engineer. Outstanding job!

### 3.3 Tracking Interviews

Interviews related to a Job Applicant can be easily tracked from its dashboard.

### 3.4 Interview Reminder

You can configure DellSuite HR to send reminder emails to Interviewers for upcoming Interviews.

# Interview Feedback

Interview feedback refers to the information and comments provided about a job applicant after an interview.

The Interview Feedback doctype allows you to assess a Job Applicant's Skills and comment on the Interview in general.

To access Interview Feedback, go to:

Home > Human Resources > Recruitment > Interview Feedback

## 1. Prerequisites

Before creating an Interview Feedback, it is advisable you create the following:

- [Interview Round](#)
- [Interview](#)

## 2. How to Create an Interview Feedback

1. Go to the Interview Feedback list and click on Add Interview Feedback.
2. Select the Interview, Interviewer and Result.
3. Selecting the Interview should automatically populate the Skill Assessment table with the Skills defined in the Interview Round corresponding to the selected Interview. You can then fill out stars for each Skill based on the Job Applicant's performance.
4. Fill in the Feedback section with general feedback regarding the Interview (optional).
5. Click on Save, and then Submit.

HR

>

Interview Feedback

>

HR-INT-FEED-0001-1

Search or type a command (Ctrl + G)

Help

A

Submitted

<

>

...

Cancel

Assigned To

Add Assignee

Attachments

Add File

Tags

Add Tags

Shared With

Invite

0

0

FOLLOW

You last edited this · 3 hours ago

You created this · 3 hours ago

Details

Interview \*

HR-INT-2023-0001

Interviewer \*

Interview Round \*

Technical Round

Result \*

Cleared

Job Applicant

ron@gmail.com

Skill Assessment

	No.	Skill *	Rating *	
<input type="checkbox"/>	1	Python	★★★★★	Edit
<input type="checkbox"/>	2	JavaScript	★★★★★	Edit
<input type="checkbox"/>	3	SQL	★★★☆☆	Edit
<input type="checkbox"/>	4	HTML/CSS	★★★★★	Edit
<input type="checkbox"/>	5	Problem-solving	★★★★★	Edit

Feedback

I was thoroughly impressed with the performance of the candidate during the technical interview round for the Product Engineer position. Their depth of technical knowledge and problem-solving skills are truly exceptional. Their ability to articulate complex concepts with clarity and precision is commendable, and their passion for the field is evident. I believe they would be a valuable addition to our team, and I look forward to seeing the innovative contributions they can make as a Product Engineer. Outstanding job!

## 3. Features

### 3.1 Feedback Summary

After submitting the Interview Feedback, you can view a summary of all the feedback associated with the Interview under its [Feedback Tab](#).

### 3.2 Interview Feedback Reminder

You can [configure](#) DellSuite HR to send reminder emails to Interviewers for their Feedback.

## Job Offer

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

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

Home > Human Resource > Recruitment > Job Offer

## 1. Prerequisites

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

- [Staffing Plan](#)
- [Job Applicant](#)
- [Job Opening](#)

## 2. How to Create a Job Offer

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



ERPNext  Demo User 89

**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:**

# Appointment Letter

Introduced in Version 13

The letter written by the employer requesting the selected candidates to join in a specific position.

In DellSuite HR you can create an Appointment Letter that you can give to candidates. To access Appointment Letter, go to:

Home > Human Resource > Recruitment > Appointment Letter

## 1. Prerequisites

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

- [Job Applicant](#)

## 2. How to Create an Appointment Letter



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

New Appointment Letter

Not Saved

Save

Job Applicant \*

Jane Doe - janedoe@example.com - software-developer

Company \*

Unico Plastics Inc

Applicant Name \*

Jane Doe

Appointment Date \*

01-05-2021

Appointment Letter Template \*

HR-APP-LETTER-TEMP-00001

Body

Introduction \*

This is in reference to our discussion with you and your interest to work with Frappe Technologies Pvt Ltd, Mumbai. We are pleased to appoint you as an "Engineer" in the company on the terms and conditions enumerated hereunder. Please consider this Letter Of Appointment and by accepting the position in the company you are legally binding yourself to the terms and conditions as detailed in this Letter Of Appointment.

Terms

<input type="checkbox"/> No.	Title	Description	
<input type="checkbox"/> 1	Location	Your primary place of posting will be Mumbai	<a href="#">Edit</a>

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

## 3. Features

### 3.1 Appointment Letter Template

1. Go to Appointment Letter Template list, click to New.

2. Fill Introduction, Terms and, Closing Statement.
3. Click on Save.

HR-APP-LETTER-00001

< > ⌂ ... Save

Tags

Add a tag ...

0 · 0 FOLLOW

You edited this 32 minutes ago

You created this 36 minutes ago

Body

Introduction \*

This is in reference to our discussion with you and your interest to work with Frappe Technologies Pvt Ltd, Mumbai. We are pleased to appoint you as an "Engineer" in the company on the terms and conditions enumerated hereunder. Please consider this Letter Of Appointment and by accepting the position in the company you are legally binding yourself to the terms and conditions as detailed in this Letter Of Appointment.

Terms

<input type="checkbox"/>	No.	Title	Description	
<input type="checkbox"/>	1	Location	Your primary place of posting will be Mumbai	<a href="#">Edit</a>
<input type="checkbox"/>	2	Effective Date	your appointment will be effective from 2nd May2021	<a href="#">Edit</a>
<input type="checkbox"/>	3	Probation	You will be on probation for the first 3 months	<a href="#">Edit</a>
<input type="checkbox"/>	4	Working hours	Your working hours will be Monday to Friday, 10:00 am - 6:00 pm	<a href="#">Edit</a>
<input type="checkbox"/>	5	Compensation	Your compensation package will be Rs. 500,000 / P.A	<a href="#">Edit</a>
<input type="checkbox"/>	6	Leave Entitlement	You will be entitled to 30 Annual Leaves	<a href="#">Edit</a>

Add Row

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

## 3.2 Print Format

You can create new or use existing standard print formats.

Hiamanshu,

Date: 2020-01-21

This has reference to our discussions with you and your interest to work with the Frappe Technologies Pvt. Ltd., Mumbai. We are pleased to appoint you as "Engineer" in the Company on the terms and conditions enumerated hereunder. Please consider this Letter of Appointment as a legal document and by accepting the position in the company you are legally binding yourself to the terms and conditions as detailed in this Letter of Appointment.

- **Effective Date:** Your appointment will be effective from 24th Sept '18 and you will be working from Pune.
- **Location:** Your primary place of posting will be in Mumbai. However, you may be required to travel to and relocate to any of the other Offices, Project locations, Divisions and Departments, of the Company or its group concerns, either within India or outside India.
- **Retirement:** The retirement age will be 60 years.
- **Working hours:** Your working hours will be: Monday to Friday: 10:00 – 18:00 hours. Working hours are flexible and you can also work from home.
- **Leave entitlement:** You will be entitled for Annual Leaves of 30 (Calendar days), which is further divided as Casual Leaves of 20 (Calendar days) & Sick Leaves of 10 (Calendar days).
- **Probation:** You will be on probation for first Three (3) months from the date of your joining the organization. If in the opinion of the Company you are found suitable in the appointed post you will be confirmed.
- **Compensation:** Your compensation package is Rs. 400,000/- P.A. Rs. 50,000 will be paid quarterly after evaluating the performance (included in CTC). Detailed salary structure is explained in Annexure 1.

Your sincerely,  
**For Frappe**

I have read and clearly understood the above terms and conditions of the Letter of Appointment, and agree to be bound by the same.

---

Hiamanshu

## Employee Referral

Introduced In Version 13

Internal Recruitment is one of the best processes for recruitment, and it also saves effort and capital.

The Employee Referral is a process where existing employees refer a suitable candidate from their network for a vacant designation/position.

In DellSuite HR, you can manage Employee Referrals.

To access Employee Referral, go to:

Human Resources > Recruitment > Employee Referral

## **1. Prerequisites**

1. Employee
2. Additional Salary
3. Job Applicant

## **2. How to create Employee Referral**

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

HR > Employee Referral > HR-REF-0006

Search or type a command (Ctrl + G)

Help

Anushka B

Pending

Reject Employee Referral

Create Job Applicant

<

>

⌂

...

Cancel

+

Attachments

Attach File

+

☆

Reviews

+

👤

Shared With

+

🏷️

Tags

Add a tag ...

♥️ 0 · 0

FOLLOW

You edited this

7 months ago

You created this

7 months ago

Connections

First Name \*

Anushka

Date \*

29-08-2022

Last Name \*

B

Status \*

Pending

Full Name

Anushka B

For Designation \*

Business Development Manager

Referral Details

Email \*

anushka@gmail.com

Contact No.

9878678909

Referrer Details

Referrer \*

HR-EMP-00001

Referrer Name

Rucha Mahabab

☒ Is Applicable for Referral Bonus

Referral Bonus Payment Status

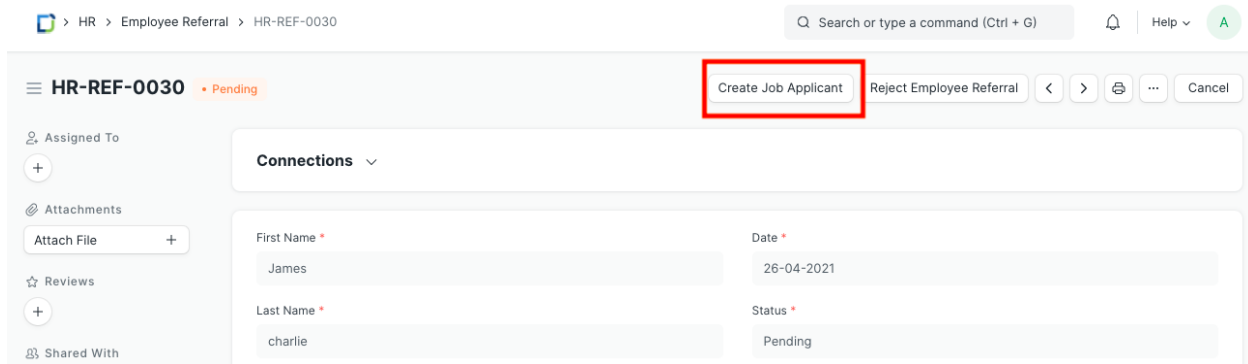
Unpaid

## 3. Features

### 3.1 Creating Job Applicant and auto-syncing status from Job Applicant

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

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



HR > Employee Referral > HR-REF-0030

Search or type a command (Ctrl + G) | Help

**HR-REF-0030** • Pending

Create Job Applicant | Reject Employee Referral | < | > | ... | Cancel

Assigned To: +

Attachments: Attach File +

Reviews: +

Shared With: 3

**Connections** ▾

First Name \* James

Date \* 26-04-2021

Last Name \* charlie

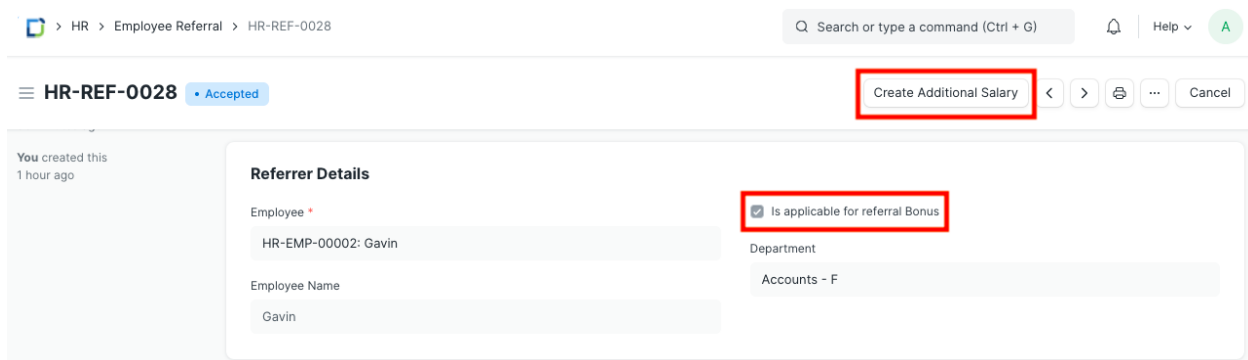
Status \* Pending

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

## 3.2 Managing referral bonus

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

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



HR > Employee Referral > HR-REF-0028

Search or type a command (Ctrl + G) | Help

**HR-REF-0028** • Accepted

Create Additional Salary | < | > | ... | Cancel

You created this 1 hour ago

**Referrer Details**

Employee \* HR-EMP-00002: Gavin

Employee Name Gavin

Department Accounts - F

☒ Is applicable for referral Bonus

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

New Additional Salary • Not Saved

Save

Series \*

HR-ADS-YY-.MM.-

Company \*

frappe

Employee \*

HR-EMP-00002

Currency \*

INR

Salary Component \*

Incentive

Payroll Date \*

27-04-2021

Salary Component Type

Earning

Date on which this component is applied

☐ Is Recurring

☐ Overwrite Salary Structure Amount

☐ Deduct Full Tax on Selected Payroll Date

Amount \*

10,000.00

Reference Document Type

Employee Referral

Reference Document

HR-REF-0028

# Training



# Training Program

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

In DellSuite HR, you can create a Training Program and schedule [Training Events](#) under it.

To access Training Program, go to:

Home > Human Resources > Training > Training Program

## 1. How to create a Training Program

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

HR

Training Program

Consultant Training

Search or type a command (Ctrl + G)

Help

Consultant Training

Scheduled

<

>

Print

More

Save

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0

0

0

FOLLOW

You edited this just now

You created this just now

Connections

Training Events

Training Event

+

Status

Scheduled

Company

Unico Plastics Inc

Trainer Name

James Barrows

Supplier

Supplier1

Trainer Email

james@example.com

Contact Number

12345678

Description

Normal

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B

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A

A

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</>

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🖼️

☰

☰

☰

☰

☰

Table

•

Basic training for newly joined consultants

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

Once the Training Program is saved, you can create Training Events under the same.

## 2. Related Topics

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

# Training Event

Training Event allows you to schedule seminars, workshops, conferences, etc. under a Training Program.

You can also invite your employees to attend the event using this feature.

To access Training Event, go to:

Home > Human Resources > Training > Training Event

## 1. Prerequisites

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

- [Training Program](#)
- [Employee](#)

## 2. How to create a Training Event

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

HR > Training Event > Introduction to JavaScript

Search or type a command (Ctrl + G)

Help

A

Introduction to JavaScript

Submitted

Training Result

Training Feedback

<

>

...

Cancel

+

Shared With

+

Tags

Add a tag ...

0

0

FOLLOW

You edited this

2 days ago

You created this

1 week ago

Event Status \*

Scheduled

Has Certificate

Type \*

Seminar

Company

Unico Plastics Inc

Location \*

Bangalore

Start Time \*

01-06-2021 22:17:43

End Time \*

02-06-2021 22:17:43

Introduction \*

Attend a workshop on programming

Attendees

Employees

<input type="checkbox"/>	No.	Employee	Status	Attendance	
<input type="checkbox"/>	1	HR-EMP-00001	Open	Mandatory	Edit
<input type="checkbox"/>	2	HR-EMP-00002	Open	Mandatory	Edit
<input type="checkbox"/>	3	HR-EMP-00003	Open	Mandatory	Edit

Add Multiple

Add Row

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

## 3. Features

### 3.1 Inviting Employees for the Event

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

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

HR > Training Event > Introduction to JavaScript

Search or type a command (Ctrl + G)

Help

Introduction to JavaScript

Submitted

Training Result

Training Feedback

<

>

...

Cancel

Attendees

Employees

<input type="checkbox"/>	No.	Employee	Status	Attendance	
<input type="checkbox"/>	1	HR-EMP-00001	Open	Mandatory	<a href="#">Edit</a>
<input type="checkbox"/>	2	HR-EMP-00002	Open	Mandatory	<a href="#">Edit</a>
<input type="checkbox"/>	3	HR-EMP-00003	Open	Mandatory	<a href="#">Edit</a>

Add Multiple

Add 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.

## 4. Related Topics

1. [Training Result](#)
2. [Training Feedback](#)
3. [Course](#)

## Training Result

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

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

To access Training Result, go to:

Home > Human Resources > Training > Training Result

# 1. Prerequisites

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

- [Training Program](#)
- [Training Event](#)
- [Employee](#)

## 2. How to create a Training Result

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

HR > Training Result > HR-TRR-2021-00001

Search or type a command (Ctrl + G) | Help | A

**Introduction to JavaScript** • Submitted

Assigned To

Attachments

Attach File

Reviews

Shared With

Tags

Add a tag ...

Training Event \*

Introduction to JavaScript

Employees

No.	Employee	Hours	Grade	Comments	
1	HR-EMP-00001	2	A	Excellent	Edit
2	HR-EMP-00005	2	B	Fair	Edit
3	HR-EMP-00003	0	A	Excellent	Edit

Add Row

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.

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

### 3. Related Topics

1. [Training Feedback](#)

## Training Feedback

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

To access Training Feedback, go to: > Human Resources > Training > Training Feedback

### 1. Prerequisites

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

- [Training Program](#)
- [Training Event](#)
- [Employee](#)

### 2. How to create a Training Feedback

1. Go to the Training Feedback list, click on New.
2. Select the Employee.
3. Select the Training Event. Based on that, the corresponding Event Name, Course and Trainer Name will get fetched.
4. Enter the feedback in the Feedback box.
5. Save and Submit.

> HR > Training Feedback > HR-TRF-2021-00001

Search or type a command (Ctrl + G)

Help

A

Albert Einstein

Submitted

< > ⌂ ... Cancel

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0 · 0 FOLLOW

Employee

HR-EMP-00001

Employee Name

Albert Einstein

Department

Research & Development - UP

Training Event

Introduction to JavaScript

Event Name

Introduction to JavaScript

Feedback

- Topics were explained clearly

- Practicals were well planned

- Overall good

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

## 3. Related Topics

### 1. Training Result



# Employee Lifecycle

# Employee Lifecycle Management

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

## 1. Topics

1. [Employee Onboarding](#)
2. [Employee Promotion](#)
3. [Employee Separation](#)
4. [Employee Transfer](#)
5. [Employee Skill Map](#)

## Employee Onboarding

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

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

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

- Perform a legal and professional background check
- Create an Employee master
- Create an Email Account

- Create an identity card
- Allocate leaves

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

Human Resources > Employee Lifecycle > Employee Onboarding

## 1. Prerequisites

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

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

## 2. How to create an Employee Onboarding

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

HR > Employee Onboarding > HR-EMP-ONB-2021-00001

Search or type a command (Ctrl + G) | Help | A

**Jane Doe** • Pending

View | Create | < | > | ... | Cancel

Assigned To

+

Attachments

Attach File +

Reviews

+

Shared With

+

Tags

Add a tag ...

0 · 0 FOLLOW

You edited this 4 days ago

Job Applicant *	Employee Onboarding Template
Jane Doe - janedoe@example.com - software-developer	HR-EMP-ONT-00001
Job Offer *	Company
HR-OFF-2021-00001	Unico Plastics Inc
Employee Name *	Department
Jane Doe	Research & Development - UP
Date of Joining	Designation
31-05-2021	Software Developer
Status	Employee Grade
Pending	L5
<input type="checkbox"/> Notify users by email	Project
	PROJ-0001

Note 1: If an Employee Onboarding Template isn't created, you can directly fill the onboarding information in the Employee Onboarding doctype itself.

Note 2: The 'Status' of the Employee Onboarding will change to Completed once all the associated Activities are complete.

## 3. Features

### 3.1 Employee Onboarding Template

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

To create a new Employee Onboarding Template:

1. Go to: Human Resources > Employee Lifecycle > Employee Onboarding Template > New.
2. Enter the Department, Designation and Employee Grade (optional).

3. Mention the Activities for onboarding. For each Activity, you can also mention the User or Role, or one of it, to whom this Activity will be assigned.
4. You can also schedule the Onboarding Activities by specifying the Begin On (Days) i.e. when the activity has to start and the Duration (in Days) for the same.

HR > Employee Onboarding Template > HR-EMP-ONT-00001

Search or type a command (Ctrl + G)

Help

A

Engineer

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0 · 0

FOLLOW

You edited this

2 hours ago

You created this

3 hours ago

Connections

Employee Onboarding

+

Company

Frappe

Designation

Engineer

Department

Research & Development - F

Employee Grade

SDE-1

Activities

No.	Activity Name	User	Role	Begin On (Days)	Duration (Days)	
1	Laptop Assignment	reema@erpnext.com	HR Mana...	1	1	Edit
2	Introduction to the company	reema@erpnext.com	HR Mana...	1	1	Edit
3	Explain coding standards	floyd@erpnext.com	Employee	1	1	Edit
4	Training Kickoff	floyd@erpnext.com	Employee	2	30	Edit

Add Row

## 3.2 Tasks and Assignments

On submission of the Employee Onboarding, a Project will be created. Within the Project, Tasks will also be created for each Activity. If you have set the date and duration against activities, tasks will be created with appropriate Start and End Date excluding holidays.

You can view the created Projects and Tasks as shown below:

HR > Employee Onboarding > HR-EMP-ONB-2021-00001

Search or type a command (Ctrl + G) | Help | A

**Jane Doe** • Pending

Assigned To: +

Attachments: Attach File +

Reviews: +

Shared With: +

Tags: Add a tag ...

0 · 0 FOLLOW

View: Create: < > Print ... Cancel

Project Task

Job Applicant: Jane Doe - janedoe@example.com - software-developer

Employee Onboarding Task: HR-EMP-ONB-2021-00001

Job Offer: HR-OFF-2021-00001

Company: Unico Plastics Inc

Employee Name: Jane Doe

Department: Research & Development - UP

Date of Joining: 31-05-2021

Designation: Software Developer

Status: Pending

Employee Grade: L5

Project: PROJ-0001

☐ Notify users by email

Additionally, each Activity can be assigned weights based on its importance.

HR > Employee Onboarding > HR-EMP-ONB-2021-00001

Search or type a command (Ctrl + G) | Help | A

**Jane Doe** • Pending

View: Create: < > Print ... Cancel

z uay> ayg

You created this 2 days ago

Activities

No.	Activity Name	User	Role	
2	Create an employee master	bruce@erpnext.com	HR Manager	Edit
3	Create an email account	abc@example.com	HR Manager	Edit
4	Create an identity card	albert@erpnext.com	HR Manager	Edit
5	Allocate leaves	bruce@erpnext.com	Leave Approver	Edit

Add Row

Editing Row #1

Activity Name: Perform a legal and professional background check

User: albert@erpnext.com

Role: HR Manager

Task: TASK-2021-00001

Task Weight: 0

☐ Required for Employee Creation

Applicable in the case of Employee Onboarding

Shortcuts: Ctrl + Up, Ctrl + Down, ESC

Insert Below

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

### 3.3 Employee Creation

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

The screenshot shows the DellSuite HR interface for an Employee Onboarding record. The breadcrumb trail is HR > Employee Onboarding > HR-EMP-ONB-2021-00001. The record is for Jane Doe, with a status of Pending. The form is divided into two columns. The left column contains fields for Job Applicant (Jane Doe - janedoe@example.com - software-developer), Job Offer (HR-OFF-2021-00001), Employee Name (Jane Doe), Date of Joining (31-05-2021), Status (Pending), and a checkbox for 'Notify users by email'. The right column contains fields for Employee Onboarding Template (HR-EMP-ONT-00001), Company (Unico Plastics Inc), Department (Research & Development - UP), Designation (Software Developer), Employee Grade (L5), and Project (PROJ-0001). A 'View' button is visible, and a 'Create' button is highlighted with a red box, with a dropdown menu open showing the 'Employee' option. The left sidebar shows various actions like 'Assigned To', 'Attachments', 'Reviews', 'Shared With', and 'Tags'. The bottom of the sidebar shows 'You edited this 2 days ago'.

## 4. Related Topics

1. [Employee Promotion](#)
2. [Employee Separation](#)
3. [Employee Transfer](#)

## Employee Promotion

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

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

To access Employee Promotion, go to:

## 1. Prerequisites

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

- Employee
- Department

## 2. How to create an Employee Promotion

1. Go to: Employee Promotion > New.
2. Select the Employee.
3. Enter the Promotion Date.
4. In the Employee Promotion Detail table, select the Property and set the Current and New value.

HR > Employee Promotion > HR-EMP-PRO-2021-00001

Search or type a command (Ctrl + G)

Help

Albert Einstein

Submitted

< > Print ... Cancel

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0

0

FOLLOW

You edited this

just now

Employee \*

HR-EMP-00001

Promotion Date \*

01-05-2021

Employee Name

Albert Einstein

Company

Unico Plastics Inc

Department

Research & Development - UP

Employee Promotion Details

Employee Promotion Detail

<input type="checkbox"/>	No.	Property	Current	New	
<input type="checkbox"/>	1	Designation	Engineer	Manager	<a href="#">Edit</a>

Add Row



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

### 3. Related Topics

1. [Employee Onboarding](#)
2. [Employee Separation](#)
3. [Employee Transfer](#)

## Employee Separation

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

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

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

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

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

## 1. Prerequisites

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

- [Employee](#)
- [Department](#)
- [Designation](#)
- [Employee Grade](#)

## 2. How to create an Employee Separation

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

HR

> Employee Separation

> new-employee-separation-3

Search or type a command (Ctrl + G)

Help

New Employee Separation

Not Saved

Save

Employee

HR-EMP-00001

Employee Name

Albert Einstein

Resignation Letter Date

15-05-2021

Status

Pending

☐ Notify users by email

Employee Separation Template

HR-EMP-STP-00001

Company

Unico Plastics Inc

Department

Research & Development - UP

Designation

Manager

Employee Grade

L5

Activities

<input type="checkbox"/> No.	Activity Name	User	Role	
<input type="checkbox"/> 1	Collect laptop	bruce@erpnext.com	HR User	<a href="#">Edit</a>
<input type="checkbox"/> 2	Clear dues	michelle@erpnext.com	HR Manager	<a href="#">Edit</a>
<input type="checkbox"/> 3	Delete employee email account	bruce@erpnext.com	HR Manager	<a href="#">Edit</a>
<input type="checkbox"/> 4	Collect identity card	michelle@erpnext.com	HR User	<a href="#">Edit</a>

Add Row

Note 1: If an Employee Separation Template isn't created, you can directly fill the separation information in the Employee Separation doctype itself.

Note 2: The 'Status' of the Employee Separation will change to Completed once all the associated Activities are complete.

## 3. Features

### 3.1 Employee Separation Template

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

To create a new Employee Separation Template:

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

HR > Employee Separation Template > HR-EMP-STP-00001

Search or type a command (Ctrl + G)

Help

Engineer

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0 · 0

FOLLOW

You edited this just now

You created this 4 months ago

Connections

Employee Separation

+

Company

Frappe

Designation

Engineer

Department

Research & Development - F

Employee Grade

SDE-1

Activities

No.	Activity Name	User	Begin On (Days)	Duration (Days)	
1	Take Exit Interview	reema@erpnext.com	1	1	Edit
2	Collect Laptop	reema@erpnext.com	2	1	Edit

Add Row

## 3.2 Tasks and Assignments

On submission of the Employee Separation, a Project will be created. Within the Project, Tasks will also be created for each Activity. If you have set the date and duration against activities, tasks will be created with appropriate Start and End Date excluding holidays.

You can view the created Projects and Tasks through View > Project/ Tasks.

Additionally, each Activity can be assigned weights based on its importance.

The screenshot shows a web application interface for 'Employee Separation'. The breadcrumb trail is 'HR > Employee Separation > HR-EMP-SEP-2021-00002'. The user is logged in as 'Engineer' and has a 'Not Saved' indicator. A modal titled 'Editing Row #1' is open, displaying the following fields:

- Activity Name:** Collect laptop
- Task Weight:** 1.000
- User:** bruce@erpnext.com
- Role:** HR User
- Description:** Collected the laptop and other related assets from the employee

Additional controls in the modal include 'Insert Below', 'Insert Above', 'Duplicate', 'Move', and a 'Save' button. A checkbox 'Required for Employee Creation' is checked, with a note 'Applicable in the case of Employee Onboarding'.

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

### 3.3 Employee Status

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

## 4. Related Topics

1. [Employee Onboarding](#)
2. [Employee Promotion](#)
3. [Employee Separation](#)

## Employee Transfer

Employee Transfer is a form of internal mobility, in which the Employee is shifted from one job to another usually at a different location, department, or unit.

In DellSuite HR, you can record Employee transfers to different Company or Department by using the Employee Transfer document.

To access Employee Transfer go to:

Human Resource > Employee Lifecycle > Employee Transfer

## 1. Prerequisites

- [Employee](#)
- [Department](#)

## 2. How to create a Employee Transfer

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

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

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

To record an Employee Skill Map go to:

Home > Human Resource > Employee Lifecycle > Employee Skill Map

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

Example of Skills for a Designation:

The screenshot shows a web application interface for managing skills for a 'Software Developer' designation. The breadcrumb trail at the top is 'Home > HR > Designation > Software Developer'. The page title is 'Software Developer' with a 'Not Saved' status indicator. On the left sidebar, there are sections for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews', 'Shared With', and 'Tags'. The main content area has a 'Description' field with the text: 'Software developers are the creative minds behind the software programs, and they have the technical skills to build those programs or to oversee their creations.' Below this is a 'Required Skills' section containing a table with 5 rows of skills. Each row has a checkbox, a number, the skill name, and an 'Edit' link. At the bottom left, there are heart and comment icons, and a 'FOLLOW' button. Below that, it shows 'You edited this 1 week ago' and 'You created this 1 month ago'.

Software Developer • Not Saved

Assigned To

Attachments

Attach File

Reviews

Shared With

Tags

Add a tag ...

Description

Software developers are the creative minds behind the software programs, and they have the technical skills to build those programs or to oversee their creations.

Required Skills

<input type="checkbox"/>	No.	Skill	
<input type="checkbox"/>	1	Logical	Edit
<input type="checkbox"/>	2	Analytical	Edit
<input type="checkbox"/>	3	Computer programming and coding	Edit
<input type="checkbox"/>	4	Software testing and debugging	Edit
<input type="checkbox"/>	5	Creativity	Edit

You edited this 1 week ago

You created this 1 month ago

## 1. How to create an Employee Skill Map

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



HR > Employee Skill Map > new-employee-skill-map-3

Search or type a command (Ctrl + G)

Help

A

New Employee Skill Map

Not Saved

Save

Employee

HR-EMP-00001

Designation

Manager

Employee Name

Albert Einstein

Skills

Employee Skills

No.	Skill	Proficiency	Evaluation Date	
1	Computer programming and coding	★★★★★	09-05-2021	Edit
2	Analytical	★★★★★	09-05-2021	Edit
3	Creativity	★★★★★	09-05-2021	Edit
4	Logical	★★★★★	09-05-2021	Edit

Add Row

Trainings

Trainings

No.	Training	Training Date	
1	Introduction to JavaScript	02-06-2021 22:17:43	Edit

# Exit Interview

Introduced in Version 14

An Exit Interview is a survey interview conducted for an Employee who is leaving the organization.

In DellSuite HR, to access the Exit Interview, go to:

Human Resources > Employee Exit > Exit Interview

## 1. Prerequisites

Before creating an Exit Interview, it is advisable that you create the following documents:

- Employee

- Department
- Designation

Exit Interview is created for an Employee who has resigned or is being terminated. Hence it is mandatory to set the Relieving Date for the Employee in the Employee master.

## **2. How to create an Exit Interview**

1. Go to: Exit Interview > New.
2. Select the Employee. Once the Employee is selected, the corresponding Employee information such as Department, Designation, Reports To, Date of Joining, Relieving Date, etc. will automatically get fetched.
3. The status will be Pending by default.
4. When the Interview is scheduled, set the Date, select the Interviewers, and change status to Scheduled.
5. You can record the Interview Summary during the Interview.
6. Once the Exit Interview is completed, you can change the status to Completed. Final Decision can be recorded on completion (Employee Retained / Exit Confirmed).
7. Submit. On submission, the Exit Interview Date will be updated in the Employee master.

### 3.1 Sending Exit Questionnaire

During Employee Exits, companies conduct surveys by sending a questionnaire to the Employee to get feedbacks for improvement and reviews. Here is how you can conduct exit surveys:

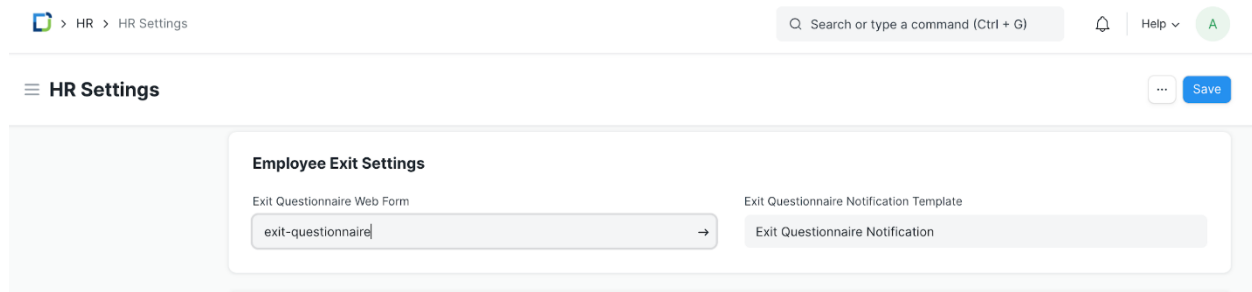
1. Since exit questionnaires will differ from company to company, you can create your own Questionnaire as a Custom DocType. For eg, we have created a sample custom doctype for the same:

The screenshot shows a web application interface for an exit questionnaire. The top navigation bar includes a search bar with the text "Search or type a command (Ctrl + G)" and a "Help" button. The main header displays "HR-EMP-00096" and a "Submitted" status. On the left sidebar, there are sections for "Assigned To", "Attachments" (with an "Attach File" button), "Reviews", "Shared With", and "Tags". The main content area contains the questionnaire form with the following questions and answers:

- What is the reason for quitting this job? \*: Growth, better opportunities
- In your opinion, were you provided the essential tools and resources required to excel in your position in our organization? \*: Yes
- Did you get along well with your team members? \*: Yes
- Did you get along well with your reporting authority? \*: Yes
- What did you enjoy the most about your job? \*: freedom, work
- What did you dislike the most about your job? \*: no mentoring or opportunity for growth
- Feedback for us \*: Better onboarding needed

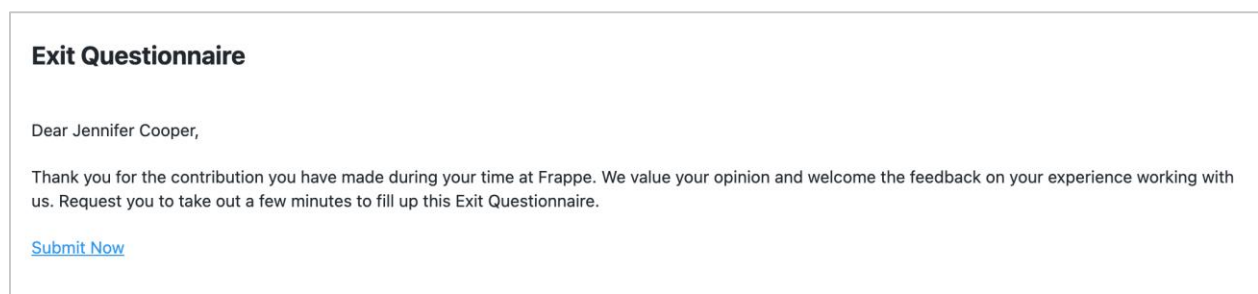
At the bottom of the form, there is a section labeled "Add a comment" with a text input field.

2. After creating the questionnaire, you can create a Web Form for the same so that these forms can be sent to employees.
3. Link the Web Form in HR Settings. A default notification email template is already provided by DellSuite HR which is linked in HR Settings.



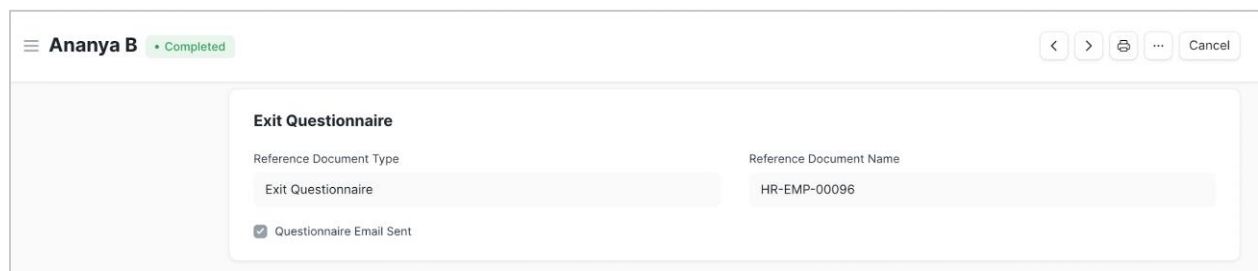
The screenshot shows the 'HR Settings' page with a sub-section titled 'Employee Exit Settings'. It contains two input fields: 'Exit Questionnaire Web Form' with the value 'exit-questionnaire' and a right-pointing arrow, and 'Exit Questionnaire Notification Template' with the value 'Exit Questionnaire Notification'. A 'Save' button is located at the top right of the settings panel.

4. In the Exit Interview document, you can see a button Send Exit Questionnaire. This will send an email to the Employee with a link to the web form as per the email template set in HR Settings.



The screenshot displays an email template titled 'Exit Questionnaire'. The content includes a salutation 'Dear Jennifer Cooper,', a thank-you message for the employee's contribution at Frappe, and a request to fill out the Exit Questionnaire. A blue link labeled 'Submit Now' is provided at the bottom.

5. Once your employee fills up this questionnaire, you can link it to the Exit Interview document.



The screenshot shows a configuration window for 'Ananya B' with a 'Completed' status. It features two input fields: 'Reference Document Type' set to 'Exit Questionnaire' and 'Reference Document Name' set to 'HR-EMP-00096'. A checkbox labeled 'Questionnaire Email Sent' is checked.

6. If you want to send Exit Questionnaires in bulk to multiple employees, you can select the employees from the Exit Interview list view and click on Actions > Send Exit Questionnaire. This will send the exit questionnaire emails and provide you with a summary of the emails sent.

The screenshot displays the 'Exit Interview' module in Frappe. On the left, there are filter options for 'Assigned To' and 'Created By', and a section for 'Edit Filters' with a 'Tags' dropdown. The main area shows a table with 2 items selected. The 'Actions' menu is open, highlighting 'Send Exit Questionnaires'.

Name	Employee	Employee Name	Frappe	Status	Date	Reports To	Relieving Date	Questionnaire Email Sent	Final Decision
Ram				Scheduled	08-12-2021		31-12-2021		HR-EXIT-INT-0...
Jennifer Cooper				Scheduled	06-12-2021		03-12-2021		HR-EXIT-INT-0...

## 4. Related Topics

1. [Employee](#)
2. [Employee Separation](#)
3. [Employee Exits Report](#)

## Full and Final Statement

When the employee is relieved from the company, all the payables, receivables, and assets allocated to the employee are settled using the Full and Final Statement or Settlement. This statement serves as a checklist to ensure smooth exit procedures with an accounting impact.

### 1. Prerequisites

Before creating a Full and Final Statement, you need to have an [Employee](#) in the system.

This document is created for an Employee who has resigned or is being terminated. Hence it is mandatory to set the Relieving Date for the Employee too.

### 2. How to create a Full and Final Statement

Go to

Employee Lifecycle > Exit > Full and Final Statement > New.

1. Select the Employee.
2. The system will pull in some components and existing documents in payables/receivables:
  - Payables: Salary Slip, Gratuity, Expense Claim, Bonus, Leave Encashment
  - Receivables: Loan, Employee Advance
3. The default status for all these will be Unsettled. Users can then select the respective document against each (like expense claims yet to be settled, bonus(additional salary), etc.) and remove the components that do not require settling.
4. Users can also add their own components or custom doctypes to this checklist.
5. The amount and payable account will be fetched if applicable otherwise, it needs to be entered manually.
  - For eg:
    1. If a loan document is selected, then the payment account is fetched and the amount is set as Total Payment - Total Amount Paid
    2. If an Employee Advance is selected, then the payment account is set as the advance's payment account, and the amount is set as  $\text{paid\_amount} - (\text{claimed\_amount} + \text{return\_amount})$
    3. If an Expense Claim is selected, then the payment account is set as the claim's payable account, and the amount is set as  $\text{grand\_total} - (\text{total\_amount\_reimbursed} + \text{total\_advance\_amount})$
    4. For gratuity, payable account and amount are fetched as is.
    5. For Salary Slip, the account is set as Payroll Payable Account and the amount is fetched from the salary slip's net\_pay
6. Based on that the total receivable/payable will be calculated

7. The system will automatically fetch assets allocated to the employee by the company (eg: laptops, phones, etc). These records are fetched from existing Asset Movement records.
8. These assets need to be returned to the company or you can also choose to recover the asset cost instead.
9. The status will be Pending by default. After reviewing all the amounts and accounts, HR can mark all the components in Payables, Receivables, and Assets as Settled.



Rucha Mahabal

Draft

<

>

🖨

⋮

Submit

Assigned To

+

Attachments

+

Reviews

+

Tags

+

Share

+

0

0

0

FOLLOW

You last edited this · just now

You created this · 2 hours ago

Submit this document to confirm

Employee \*

HR-EMP-00001

Company

Frappe

Employee Name

Rucha Mahabal

Status

Unpaid

Transaction Date \*

01-04-2024

Employee Details

Date of Joining

10-08-2019

Designation

Engineer

Relieving Date

30-04-2024

Department

Research & Development

Payables

<input type="checkbox"/>	No.	Component *	Reference Document ...	Reference Document	Account	Amount	
<input type="checkbox"/>	1	Salary Slip	Salary Slip	Sal Slip/HR-EMP-000...	Payroll Payable - F	₹ 65,392.00	
<input type="checkbox"/>	2	Expense Claim	Expense Claim	HR-EXP-2022-00003	Creditors - F	₹ 500.00	
<input type="checkbox"/>	3	Bonus	Additional Salary	HR-ADS-23-08-00003		₹ 0.00	
<input type="checkbox"/>	4	Leave Encashment	Leave Encashment	HR-ENC-2023-00001		₹ 0.00	

Add Row

Receivables

<input type="checkbox"/>	No.	Component *	Reference Document ...	Reference Document	Account	Amount	
<input type="checkbox"/>	1	Employee Advance	Employee Advance	HR-EAD-2023-00012	Cash - F	₹ 500.00	

Add Row

Assets Allocated

Automatically fetches all assets allocated to the employee, if any

<input type="checkbox"/>	No.	Reference *	Asset Name	Cost	Account	Action *	Status *	
<input type="checkbox"/>	1	ACC-ASM-2024-000...	iPhone 14	₹ 70,000.00		Return	Owned	
<input type="checkbox"/>	2	ACC-ASM-2024-000...	MacBook Pro 2023	₹ 70,000.00		Recover Cost	Owned	

Add Row

Total Asset Recovery Cost

₹ 70,000.00

Totals

Total Payable Amount

₹ 65,892.00

Total Receivable Amount

₹ 70,500.00

## 3. Features

### 3.1 Asset Cost Recovery

Consider a scenario where you allocate some assets to the employee like laptops/uniforms. In some cases, you might not want to return the asset to the company but instead, recover the asset cost and let the employee own the asset.

You can set "Action" as "Recover Cost" in such cases against such assets. This will add the Total Asset Cost for that asset to the Total Receivable Amount.

### 3.2 Settle with Journal Entry

On submission, a button to create a Journal Entry will be shown. Click on Create Journal Entry. This entry is made to record payment from the employee + payment done to the employee hence settling the account.

This will map all your accounts and amounts to your journal entry. Select the final account from where the amount should get created if not already mapped. Save and Submit. The FnF status should then change to Paid.

Accounting > Journal Entry > ACC-JV-2024-00006

Search or type a command (⌘ + G)

Help

Payroll Payable - F

Bank Entry

ViewActions<>⌂⋮Cancel

Assigned To +

Attachments +

Reviews +

Tags +

Share +

0 · 0 FOLLOW

You last edited this · 2 minutes ago

You created this · 2 minutes ago

Connections

Entry Type \*  
Bank Entry

Company \*  
Frappe

Posting Date \*  
19-04-2024

Accounting Entries

	No.	Account *	Party Type	Party	Debit	Credit	
<input type="checkbox"/>	1	Payroll Payable - F			₹ 65,392.00	₹ 0.00	
<input type="checkbox"/>	2	Creditors - F	Employee	HR-EMP-00001	₹ 500.00	₹ 0.00	
<input type="checkbox"/>	3	Cash - F	Employee	HR-EMP-00001	₹ 0.00	₹ 500.00	
<input type="checkbox"/>	4	Cash - F	Employee	HR-EMP-00001	₹ 0.00	₹ 70,000.00	
<input type="checkbox"/>	5	Salary - F			₹ 4,608.00	₹ 0.00	

Reference Number \*  
123

Reference Date \*  
19-04-2024

Total Debit  
₹ 70,500.00

Total Credit  
₹ 70,500.00

☐ Multi Currency

# Fleet Management

# 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 DellSuite HR, you can do the following:

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

## Vehicle

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

To access the Vehicle master, go to:

Human Resources > Fleet Management > Vehicle

### 1. How to create a Vehicle document

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

## 2. Features

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

### 2.1 Additional Vehicle Details

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

HR > Vehicle > MH01AB0786

Search or type a command (Ctrl + G)

Help

MH01AB0786

< > ⌂ ⋮ Save

You edited this just now

You created this 3 minutes ago

Make \*  
Maruti

Model \*  
XVI

Details

Odometer Value (Last) \*  
5000

Chassis No  
12345678AABC

Acquisition Date  
01-02-2021

Vehicle Value  
5,00,000.00

Location  
Mumbai

Employee  
HR-EMP-00003

Insurance Details

Insurance Company  
Bharat Insurance Co.Ltd

Start Date  
01-02-2021

Policy No  
1234567

End Date  
01-02-2022

## 2.2 Vehicle Attributes

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

HR > Vehicle > MH01AB0786

Search or type a command (Ctrl + G)

Help

MH01AB0786 • Not Saved

< > ⌂ ⋮ Save

Additional Details

Fuel Type \*  
Petrol

Color  
Grey

Fuel UOM \*  
Litre

Wheels  
4

Last Carbon Check  
01-05-2021

Doors  
4

## Vehicle Log

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

To access Vehicle Log, go to:

Human Resources > Fleet Management > Vehicle Log

## 1. Prerequisites

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

- Vehicle

## 2. How to create a Vehicle Log

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

Human Resources
>
Vehicle Log

Search or type a command (Ctrl + G)

Settings
Help
81

HR-VLOG-2019-00001
Submitted

Assigned To  
Assign +

Attachments  
Attach File +

Tags  
Add a tag ...

Reviews  
+

Shared With  
+

You edited this  
a few seconds ago

You created this  
12 minutes ago

License Plate  
MH01AB0786

Employee  
HR-EMP-00002

Model  
Maruti

Make  
XVI

ODOMETER READING

Date  
23-08-2019

Odometer  
5000

REFUELLING DETAILS

Fuel Qty  
5

Supplier  
Scott Ties

Fuel Price  
₹ 50.00

Invoice Ref  
SC-1234

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

Human Resources
>
Vehicle Log

Search or type a command (Ctrl + G)

Settings
Help
81

HR-VLOG-2019-00001
Submitted

SERVICE DETAILS

Service Detail

	Service Item	Type	Frequency	Expense	
<input type="checkbox"/>	1 Oil Change	Inspection	Mileage	₹ 500.00	▼
<input type="checkbox"/>	2 Wheels	Change	Half Yearly	₹ 1,500.00	▼

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

## 3. Features

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

### 3.1 Make Expense Claim against Vehicle Expenses



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

The screenshot shows a web application interface for a vehicle log entry. The breadcrumb navigation at the top reads: > HR > Vehicle Log > HR-VLOG-2021-00001. A search bar on the right contains the text "Search or type a command (Ctrl + G)". The main header area displays "HR-VLOG-2021-00001" with a "Submitted" status tag. On the left sidebar, there are sections for "Assigned To", "Attachments" (with an "Attach File" button), "Reviews", "Shared With", and "Tags". The main content area contains two form sections. The first section has fields for "License Plate" (MH01AB0786), "Employee" (HR-EMP-00003), "Model" (XVI), and "Make" (Maruti). The second section, titled "Odometer Reading", has fields for "Date" (01-05-2021), "Current Odometer value" (5000), and "last Odometer Value" (5000). A red box highlights the "Expense Claim" button located in the top right corner of the main content area, next to the "Create" button and navigation icons.

When you click on 'Make Expense Claim',

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

Reviews

Shared With

You edited this in a few seconds

You created this a few seconds ago

From Employee

HR-EMP-00002: Michelle Alva

Expense Approver

jane@example.com

Employee Name

Michelle Alva

Approval Status

Approved

Expenses

	Expense Date	Expense Claim Type	Description	Amount	Sanctioned Amount	
<input type="checkbox"/>						
<input type="checkbox"/>	123-08-2019	Vehicle		₹ 2,050.00	₹ 0.00	

Total Sanctioned Amount

₹ 0.00

Grand Total

₹ 0.00

Total Taxes and Charges

₹ 0.00

Total Claimed Amount

₹ 2,050.00

Total Advance Amount

₹ 0.00

Total Amount Reimbursed

₹ 0.00

Posting Date

23-08-2019

Remark

Expense Claim for Vehicle Log HR-VLOG-2019-00001

Vehicle Log

HR-VLOG-2019-00001

# Salary Payouts

# 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 DellSuite,

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

## Payroll Period

Payroll Period, in DellSuite, 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, DellSuite 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 DellSuite 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

Payroll > Salary Component > Basic

Search or type a command (Ctrl + G) Help A

**Basic** • Enabled

Assigned To +

Attachments Attach File +

Reviews +

Shared With +

Tags Add a tag ...

0 0 FOLLOW

You edited this 30 minutes ago

You created this 3 weeks ago

**Abbr \***  
B

**Type \***  
Earning

**Description**  
Basic

☒ Depends on Payment Days

☒ Is Tax Applicable

☐ Deduct Full Tax on Selected Payroll Date

☐ Round to the Nearest Integer

☐ Statistical Component

If selected, the value specified or calculated in this component will not contribute to the earnings or deductions. However, it's value can be referenced by other components that can be added or deducted.

☐ Do Not Include in Total

☐ Disabled

**Flexible Benefits**

☐ Is Flexible Benefit

**Accounts**

No.	Company	Account	
1	Unico Plastics Inc		Edit

Add Row

- **Is Additional Component:** This option specifies that the component can only be paid as Additional Salary. Examples of this component could be Performance Bonus or pay received

for on-site deputation etc. Such components are not considered to be part of normal Salary Structure. Instead, Additional Salary with these components can be submitted as required which will be added to the Salary Slip automatically.

- Is Tax Applicable: If a component needs to be considered for Tax calculations specified as per the Payroll Period you may want to enable this option. It would be required that you have a Payroll Period and Income Tax Slab configured with valid Tax Slabs for payroll processing.
- Is Payable: Such components can be booked against separate payable accounts and the Accounts shall be configured in the Accounts table
- Flexible Benefits: Flexible Benefits are earning components which Employees can choose to receive on a pro-rata basis or annually when they claim for. These are mostly tax exempted, unless the Employee fail to file the claim with adequate bills / documents. If turned on, you can specify the maximum benefit allowed for an employee in a year. Employees can create Employee Benefit Application with the ones they opt for.

Note: Employee Benefit Application will only allow Employees to only choose from the flexible components which are present in the Salary Structure assigned to the Employee

+ Pay Against Benefit Claim: Employees can opt to receive flexible benefits annually via Employee Benefit Claim or along with their salary every month. If you *enable* this, the 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 Salary Component]

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

## Deduction

Human Resources > Salary Component

Search or type a command (Ctrl + G)

Administrator Help60

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

IT

Type

Deduction

☐ Is Additional Component

☒ Is Payable

☐ Depends on Leave Without Pay

☐ Do not include in total

☐ Disabled

Description

Income Tax

☐ 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

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

Add Row

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

## 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.



Payroll > Salary Structure > Albert Einstein

Search or type a command (Ctrl + G)

Help

A

Albert Einstein

Submitted

Preview Salary Slip

Assign Salary Structure

Assign to Employees

<

>

...

Cancel

Salary breakup based on Earning and Deduction.

Earnings

No.	Component	Abbr	Amount	Statistic...	Formula	
1	Basic	B_1	₹ 0.00		Base * 0.4	Edit
2	House Rent Allowance	HRA	₹ 0.00		B * 0.3	Edit
3	Dearness Allowance	DA	₹ 0.00		B * 0.2	Edit

Add Row

Deductions

No.	Component	Abbr	Amount	Statistic...	Formula	
1	Professional Tax	PT	₹ 0.00		B * 0.1	Edit
2	Maharashtra Labour Welfare Fund	MLWF	₹ 12.00			Edit

Add Row

Condition and Formula Help

A submitted Salary Structure

## 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)

<input checked="" type="checkbox"/> Salary Slip Based on Timesheet	Salary Component
	<input type="text" value="Bonus"/>
	Salary Component for timesheet based payroll.
	Hour Rate
	<input type="text" value="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 Ta
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

n 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
<input type="text" value="Cash"/>	<input type="text" value="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 DellSuite 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 DellSuite 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

Payroll > Salary Structure Assignment > HR-SSA-21-05-00001

Search or type a command (Ctrl + G)

Help

Nabin Baran Hait

Submitted

< > Print ... Cancel

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

Employee \*

HR-EMP-00003

Employee Name

Nabin Baran Hait

Company \*

Unico Plastics Inc

Payroll Payable Account

Payroll Payable - UP

Salary Structure \*

nabin1-1

From Date \*

01-04-2021

Income Tax Slab

Income Tax Regime 2021-22

Currency \*

INR

Base

₹ 1,00,000.00

Variable

₹ 0.00

## 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

Tags

Add a tag ...

0 · 0

FOLLOW

You edited this

2 minutes ago

You created this

2 minutes ago

Select Employees

Posting Date \*

10-05-2021

Payroll Frequency \*

Monthly

Company \*

Unico Plastics Inc

Currency \*

INR

Exchange Rate \*

0.014000000

Payroll Payable Account \*

Cash In Hand - TC

Employees

Branch

Designation

Department

Number Of Employees

1

Employee Details

No.	Employee	Employee Name	Department	Designation	
1	HR-EMP-00001	Albert Einstein	Research & Developme...	Manager	<a href="#">Edit</a>

Add Row

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

	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 companies issues a single payment to the bank combining all salaries and the bank distributes the salaries to each employee's salary account. This way there is only one payment entry in the company's books of accounts and anyone with access to the company's accounts will not have access to the individual salaries.

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

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

Accounting > Journal Entry

Search or type a command (Ctrl + G)

Settings Help 6

Cash - UP Bank Entry

ACC-JV-2019-00002 Menu Cancel

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Reviews

+

Shared With

+

You edited this a few seconds ago

You created this a minute ago

Bank Entry

18-07-2019

Company

Unico Plastics Inc.

Accounting Entries

	Account	Party	Debit	Credit	
<input type="checkbox"/>	1 Cash - UP		₹ 0.00	₹ 89,800.00	
<input type="checkbox"/>	2 Payroll Payable - UP		₹ 89,800.00	₹ 0.00	

Reference Number

1234567

Reference Date

19-07-2019

User Remark

Payment of salary from 2019-07-01 to 2019-07-31

Total Debit

₹ 89,800.00

Total Credit

₹ 89,800.00

Multi Currency

REFERENCE ^

Remark

Note: Payment of salary from 2019-07-01 to 2019-07-31  
Reference #1234567 dated 19-07-2019

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, DellSuite 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

<input type="checkbox"/>	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

Reference Date

User Remark

Payment of salary from 2018-01-01 to 2018-01-31

Total Debit

Total Credit

☐ Multi Currency

REFERENCE ▼

PRINTING SETTINGS ▼

MORE INFORMATION ▼

## 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

Human Reso...

Salary Slip

Search or type a command (CQ)

Administrator - Help - 60

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

Posting Date  
29-06-2018

Employee  
EMP/00001: Hatsue Kashiwagi

Employee Name  
Hatsue Kashiwagi

Designation  
Analyst

Branch

Status  
Submitted

Company  
Awesome Co

Letter Head  
Awesome Letter Head

☐ Salary Slip Based on Timesheet

Start Date  
01-05-2018

End Date  
31-05-2018

Payroll Frequency  
Monthly

Working Days  
23

Leave Without Pay  
0

Payment Days  
23

☐ Deduct Tax For Unclaimed Employee Benefits

☐ Deduct Tax For Unsubmitted Tax Exemption Proof

EARNING & DEDUCTION

Earning

<input type="checkbox"/>	Component	Amount	
<input type="checkbox"/>	Basic	₹ 75,000.	▼
<input type="checkbox"/>	Dearness Allowance	₹ 15,000.	▼
<input type="checkbox"/>	House Rent Allowance	₹ 22,500.	▼
<input type="checkbox"/>	Medical	₹ 1,250.0	▼
<input type="checkbox"/>	Conveyance	₹ 1,600.0	▼
<input type="checkbox"/>	Mobile & Telephone R...	₹ 1,000.0	▼

Deduction

<input type="checkbox"/>	Component	Amount	
<input type="checkbox"/>	Income Tax	₹ 18,605.	▼

Gross Pay  
₹ 1,16,350.00

Total Deduction  
₹ 18,605.00

## Payroll Management

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

## Related Topics

1. [Payroll Period](#)
2. [Salary Component](#)
3. [Salary Structure](#)
4. [Salary Structure Assignment](#)
5. [Payroll Entry](#)
6. [Additional Salary](#)
7. [Retention Bonus](#)
8. [Employee Incentive](#)

## Payroll Period

A Payroll Period is a period for which Employees get paid for their occupation with the Company.

Payroll Period helps you define Salary Structures and to calculate tax for a specific period based on applicable Income Tax Slab.

To access Payroll Period, go to:

Home > Human Resources > Payroll > Payroll Period

### 1. How to create a Payroll Period

1. Go to Payroll Period list, click on New.

2. Enter Name.
3. Select Start Date and End Date of Payroll Period.
4. Save.

## 2. Related Topics

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

## Income Tax Slab

Income Tax Slab is a document to define income tax rates based on different taxable income slab.

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

To access Income Tax Slab, go to: > Home > Human Resources > Payroll > Income Tax Slab

### 1. How to create an Income Tax Slab

To create a new Income Tax Slab:

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

3. Save and Submit.

## 2. Features

### 2.1 Tax Slabs

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

Income Tax Regime 2021 • Submitted

Effective from \* 01-04-2021

Currency \* INR

Company Test Company

Standard Tax Exemption Amount ₹ 50,000.00

☒ Allow Tax Exemption  
If enabled, Tax Exemption Declaration will be considered for income tax calculation.

☐ Disabled

**Taxable Salary Slabs**

No.	From Amount	To Amount	Percent Deduction	Condition	
1	₹ 2,50,001.00	₹ 5,00,000.00	5%	annual_taxable_earning > 500000	Edit
2	₹ 5,00,001.00	₹ 10,00,000.00	20%		Edit
3	₹ 10,00,001.00	₹ 0.00	30%		Edit

Add Row

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

Examples:

```
// Apply tax if employee born between 31-12-1937 and 01-01-1958 (Employees aged 60 to 80)  
date_of_birth > date(1937, 12, 31) and date_of_birth < date(1958, 01, 01)
```

```
// Apply tax by employee gender  
gender == "Male"
```

```
// Apply tax by Salary Component
```

base > 10000

// Annual Taxable income is greater than 5 lakhs  
annual\_taxable\_earning > 500000

## 2.2 Other Taxes and Charges on Income Tax

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

TAXES AND CHARGES ON INCOME TAX ^					
Other Taxes and Charges					
<input type="checkbox"/>	Description	Percent	Min Taxable Income	Max Taxable Income	
<input type="checkbox"/> 1	Health and Education Cess	4%	₹ 0.00	₹ 0.00	▼

## 2.3 Other Properties

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

## 3. Related Topics

1. [Salary Component](#)
2. [Salary Structure](#)
3. [Salary Structure Assignment](#)
4. [Payroll Entry](#)

5. [Employee Tax Exemption Declaration](#)
6. [Employee Tax Exemption Proof Submission](#)

## **Salary Component**

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

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

To access Salary Component, go to: > Home > Human Resources > Payroll > Salary Component

### **1. How to create a Salary Component**

To create a new Salary Component:

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



**Basic** Enabled

Create Update Salary Structures < > Save

### Overview

Condition & Formula Flexible Benefits

Abbr \*  
B

Type \*  
Earning

Description  
Basic

- ☒ Depends on Payment Days
- ☒ Is Tax Applicable
  - ☐ Deduct Full Tax on Selected Payroll Date
  - ☐ Round to the Nearest Integer
  - ☐ Statistical Component
 

If enabled, 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.
  - ☐ Do Not Include in Total
- ☒ Remove if Zero Valued
 

If enabled, the component will not be displayed in the salary slip if the amount is zero
- ☐ Disabled

### Accounts

No.	Company	Account	
1	Frappe	Cash - F	Edit

Add Row

## 2. Features

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

## 2.1 Condition and Formula

In this section, the Condition and Formula required for the calculation of the Salary Component can be specified. To specify the formula, enable the 'Amount based on formula' checkbox.

**Basic** Not Saved

Create Update Salary Structures < > ... Save

Assigned To +

Attachments +

Tags +

Share +

0 0 FOLLOW

You last edited this · 2 minutes ago

You created this · 2 months ago

Overview **Condition & Formula** Flexible Benefits

Condition

1 base < 100000

base Salary Structure Assignment field

base\_gross\_pay Salary Slip Field

base\_gross\_year\_to\_date Salary Slip Field

base\_hour\_rate Salary Slip Field

base\_month\_to\_date Salary Slip Field

base\_net\_pay Salary Slip Field

base\_rounded\_total Salary Slip Field

base\_total\_deduction Salary Slip Field

Expand

☒ Amount based on formula

Formula

1 base \* 0.4

Help

Notes:

1. Use field **base** for using base salary of the Employee
2. Use Salary Component abbreviations in conditions and formulas. **BS** = Basic Salary
3. Use field name for employee details in conditions and formulas. **Employment Type** = **employment\_type** **Branch** = **branch**
4. Use field name from Salary Slip in conditions and formulas. **Payment Days** = **payment\_daysLeave without pay** = **leave\_without\_pay**
5. Direct Amount can also be entered based on Condition. See example 3

Examples

1. Calculating Basic Salary based on **base**  
Condition: base < 10000  
Formula: base \* .2
2. Calculating HRA based on Basic Salary **BS**  
Condition: BS > 2000  
Formula: BS \* .1
3. Calculating TDS based on Employment Type **employment\_type**  
Condition: employment\_type=="Intern"  
Amount: 1000

You can sync updated Condition and Formula values of a Salary Component with existing Salary Structures, where the Component is being used, with the Update Salary Structures button.

**Basic** Not Saved

Create Update Salary Structures < > ... Save

Assigned To +

Attachments +

Overview **Condition & Formula** Flexible Benefits

Condition

Formula

Help

In case the Salary Component is based on a pre-defined amount, DellSuite allows you to directly enter the amount in the Amount field (disable the 'Amount based on formula' checkbox).

You can also use some mathematical/date functions while writing formula.

# Consider a component `basic` with amount as 1220.32 as an example:

# int - cast the amount as int  
int(basic) # evaluates to 1220

# flt - cast the amount as flt

```
flt(basic, 1) # evaluates to 1220.3
```

```
# round - rounds the amount (Banker's Rounding)
```

```
round(basic) # evaluates to 1220
```

```
# rounded - rounds the amount based on System Settings or passed method (Banker's Rounding or Commercial Rounding)
```

```
# If basic is 1220.5
```

```
round(1220.5) # evaluates to 1220
```

```
rounded(1220.5, rounding_method="Banker's Rounding") # evaluates to 1220
```

```
rounded(1220.5, rounding_method="Commercial Rounding") # evaluates to 1221
```

```
# ceil - rounds the number up to the nearest integer
```

```
ceil(basic) # evaluates to 1221
```

```
# floor - rounds the number down to the nearest integer
```

```
floor(basic) # evaluates to 1220
```

```
# getdate/date - casts the value `start_date` to a `datetime.date` object
```

```
# eg: Professional Tax is 300 in February and 200 in every other month. `start_date` takes up the value of salary slip's  
`start_date`
```

```
# In that case the condition can be written as given below:
```

```
300 if getdate(start_date).month == 2 else 200
```

Note: This above setup is optional. You can define Amount and Formula/Condition for a Salary Component directly in the Salary Structure also. If they are specified in the Salary Component document itself, the information will be directly fetched in the Salary Structure when the Component is selected.

## 2.2 Additional Properties

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

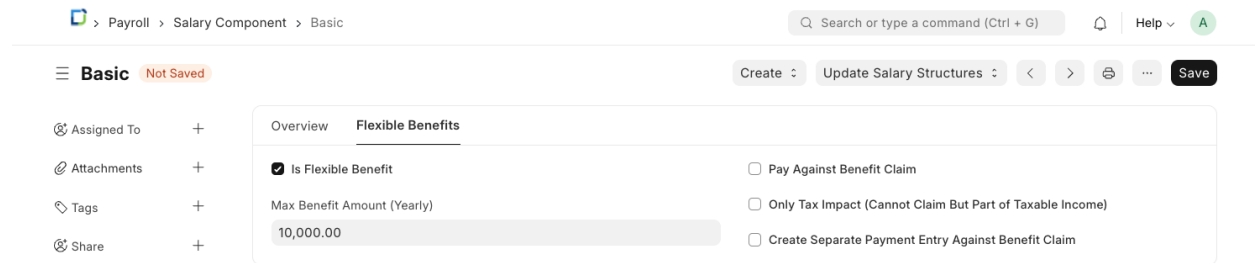
- Is Payable: Select this if the Salary Component is payable.
- Depends on Payment Days: If this checkbox is enabled then the Salary Component will be calculated based on the number of working days.
- Is Tax Applicable: This checkbox is applicable for Earning Components. Selecting this checkbox allows tax to be applied on this Salary Component.

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

## 2.3 Flexible Benefits

This section is shown if the Salary Component is an Earning Component. Flexible Benefit plans allow employees to avail the benefits they want or need from a package of programs offered by an

employer. They may include health insurance, pension plans, telephone expenses, etc. To set a Salary Component as a Flexible Benefit, check the 'Is Flexible Benefit' checkbox.



The screenshot shows a web application interface for configuring a 'Basic' salary component. The breadcrumb trail is 'Payroll > Salary Component > Basic'. A search bar and a 'Help' button are in the top right. On the left, there are links for 'Assigned To', 'Attachments', 'Tags', and 'Share'. The main content area has two tabs: 'Overview' and 'Flexible Benefits'. The 'Flexible Benefits' tab is active, showing a checked checkbox for 'Is Flexible Benefit'. Below this, the 'Max Benefit Amount (Yearly)' is set to '10,000.00'. On the right side of the tab, there are three unchecked checkboxes: 'Pay Against Benefit Claim', 'Only Tax Impact (Cannot Claim But Part of Taxable Income)', and 'Create Separate Payment Entry Against Benefit Claim'. At the top right of the main content area, there are buttons for 'Create', 'Update Salary Structures', and a 'Save' button.

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

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

### 3. Related Topics

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

## Salary Structure

Salary Structure is the details of the salary being offered to an Employee, in terms of the breakup of the different components constituting the compensation.

Any changes to the Salary Structure i.e. among the components can have a major impact on what the Employee does, such as the kind of tax exemptions claimed.

DellSuite allows you to define the Earnings and Deductions of a Salary Structure, Payroll frequency, and Payment Mode among other features.

To access Salary Structure, go to:

Home > Human Resources > Payroll > Salary Structure

## 1. Prerequisites

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

- [Salary Component](#)

## 2. How to create a Salary Structure

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

## 2. Features

### 2.1 Earnings and Deductions

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

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

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

Payroll > Salary Structure > Albert Einstein

Search or type a command (Ctrl + G)

Help

Albert Einstein

Submitted

Preview Salary Slip

Assign Salary Structure

Assign to Employees

<

>

...

Cancel

Salary breakup based on Earning and Deduction.

Earnings

<input type="checkbox"/>	No.	Component	Abbr	Amount	Statistic...	Formula	
<input type="checkbox"/>	1	Basic	B_1	₹ 0.00	<input type="checkbox"/>	Base * 0.4	<a href="#">Edit</a>
<input type="checkbox"/>	2	House Rent Allowance	HRA	₹ 0.00	<input type="checkbox"/>	B * 0.3	<a href="#">Edit</a>
<input type="checkbox"/>	3	Dearness Allowance	DA	₹ 0.00	<input type="checkbox"/>	B * 0.2	<a href="#">Edit</a>

Add Row

Deductions

<input type="checkbox"/>	No.	Component	Abbr	Amount	Statistic...	Formula	
<input type="checkbox"/>	1	Professional Tax	PT	₹ 0.00	<input type="checkbox"/>	B * 0.1	<a href="#">Edit</a>
<input type="checkbox"/>	2	Maharashtra Labour Welfare Fund	MLWF	₹ 12.00	<input type="checkbox"/>		<a href="#">Edit</a>

Add Row

Condition and Formula Help

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

## 2.2 Account

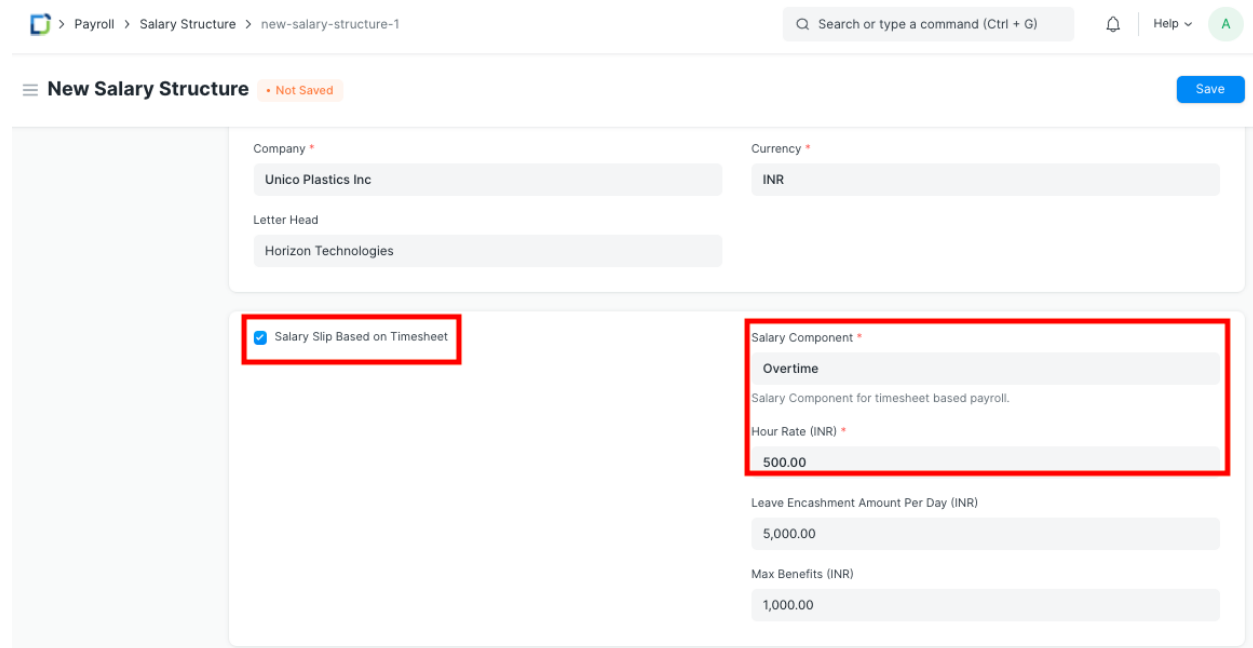
In this section, the Mode of Payment and the Payment Account that is used to pay the salary can be specified.

## 2.3 Salary Structure for Salary based on Timesheets

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

Steps for creating Salary Structure based on Timesheets:

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



Payroll > Salary Structure > new-salary-structure-1

Search or type a command (Ctrl + G) | Help | A

### New Salary Structure • Not Saved Save

<b>Company *</b> Unico Plastics Inc	<b>Currency *</b> INR
<b>Letter Head</b> Horizon Technologies	

☒ **Salary Slip Based on Timesheet**

**Salary Component \***  
**Overtime**  
Salary Component for timesheet based payroll.  
**Hour Rate (INR) \***  
500.00

**Leave Encashment Amount Per Day (INR)**  
5,000.00

**Max Benefits (INR)**  
1,000.00



## 2.4 Leave Encashment Amount Per Day

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

## 2.5 Max Benefits (Amount)

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

Once all the information is saved and submitted, you can assign the Salary Structure by clicking on the Create button and selecting 'Single Assignment' to assign a single employee or 'Bulk Assignments' to assign multiple employees via the [Salary Structure Assignment Tool](#).

You can also preview the associated Salary Slip by clicking on the Actions button and selecting 'Preview Salary Slip'.

## 3. Related Topics

1. [Salary Component](#)
2. [Salary Structure Assignment](#)
3. [Payroll Entry](#)

## Salary Structure Assignment

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

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

To access Salary Structure Assignment, go to: > Home > Human Resources > Payroll > Salary Structure Assignment

## 1. Prerequisites

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

1. Employee
2. Salary Component
3. Salary Structure

## 2. How to create a Salary Structure Assignment:

1. Go to Salary Structure Assignment list and click on New.
2. Select the Employee and Salary Structure.
3. Select the From Date from which this particular Salary Structure will be applicable.
4. Select preferred Income Tax Slab for the employee.
5. Enter Base and Variable amount as per requirement. Base amount refers to the Base Salary of the Employee, which is fixed and paid out, regardless of employees meeting their goals. Variable pay, on the other hand, is the portion of sales compensation determined by employee performance. When employees hit their goals (aka quota), variable pay is provided as a type of bonus, incentive pay, or commission.

Payroll > Salary Structure Assignment > HR-SSA-21-05-00001

Search or type a command (Ctrl + G) | Help | A

**Nabin Baran Hait** • Submitted

Assigned To: +

Attachments: Attach File +

Reviews: +

Shared With: +

Tags: Add a tag ...

0 · 0 · 0 FOLLOW

Employee *	Salary Structure *
HR-EMP-00003	nabin1-1
Employee Name	From Date *
Nabin Baran Hait	01-04-2021
Company *	Income Tax Slab
Unico Plastics Inc	Income Tax Regime 2021-22
Payroll Payable Account	Currency *
Payroll Payable - UP	INR

Base	Variable
₹ 1,00,000.00	₹ 0.00

### 3.1 Bulk Salary Structure Assignment

DellSuite also allows creating Salary Structure Assignments for multiple employees at once.

1. Go to the Salary Structure list.
2. Click on Bulk Salary Structure Assignment.
3. This will take you to the [Salary Structure Assignment Tool](#), where you can assign Salary Structures in bulk.

Payroll > Salary Structure

Search or type a command (Ctrl + G) | Help | A

**Salary Structure**

Bulk Salary Structure Assignment | List View | + Add Salary Structure

Filter By

Assigned To: | Created By: | Edit Filters

ID	Is Active	Status	Is Active	Last Updated On
ID				1 of 1
SS1		Submitted	Yes	1M 0 · 0

For version 14, follow the steps below.

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

Payroll > Salary Structure > Salary Structure 2021-22

Search or type a command (Ctrl + G) Help A

**Salary Structure 2021-22** Submitted

Preview Salary Slip **Assign Salary Structure** Assign to Employees < > Print ... Cancel

Assigned To +

Attachments  
Attach File +

Reviews +

Shared With +

Tags  
Add a tag ...

0 · 0 FOLLOW

**Connections** ^

Salary Structure Assignment + Employee Grade +

Salary Slip +

Company \*  
Unico Plastics Inc

Is Active \*  
Yes

Letter Head  
Horizon Technologies

Payroll Frequency \*  
Monthly

Currency \*  
INR

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

Payroll > Salary Structure > Salary Structure 2021-22

Search or type a command (Ctrl + G) Help A

**Salary Structure 2021-22** Submitted

Preview Salary Slip Assign Salary Structure **Assign to Employees** < > Print ... Cancel

Assigned To +

Attachments  
Attach File +

Reviews +

Shared With +

Tags  
Add a tag ...

0 · 0 FOLLOW

**Connections** ^

Salary Structure Assignment + Employee Grade +

Salary Slip +

Company \*  
Unico Plastics Inc

Is Active \*  
Yes

Letter Head  
Horizon Technologies

Payroll Frequency \*  
Monthly

Currency \*  
INR

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

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

## 4. Related Topics

1. [Salary Component](#)
2. [Salary Structure](#)
3. [Employee Grade](#)
4. [Department](#)
5. [Designation](#)
6. [Payroll Entry](#)

## Salary Structure Assignment Tool

The Salary Structure Assignment Tool allows you to assign Salary Structures to employees in bulk.

## 1. Prerequisites

Before using the Salary Structure Assignment Tool, it is advisable to create the following documents:

- [Employee](#)
- [Salary Structure](#)

## 2. How to assign Salary Structures using the Salary Structure Assignment Tool

1. Select a Company if it hasn't already been selected. This should also fetch its default Payroll Payable Account.
2. Select the Salary Structure that you wish to assign. This will fetch the Currency associated with it.
3. Select From Date which is the date from which you wish to assign the Salary Structure. This will cause all employees, that do not already have a Salary Structure Assignment on that date, to be loaded in the Select Employees table below.
4. Select an Income Tax Slab if applicable.
5. Use Quick Filters for filtering employees based on specific fields, or add additional custom filters through Advanced Filters.
6. Select suitable employees from the Select Employees table below.
7. You can update the Base and Variable amounts for an employee by double clicking and editing the required cell. If you wish to update these values in bulk, click on the Update button, select the appropriate field, and enter the desired amount. Click on Update.
8. If everything looks right, click on the Assign Structure button.

Payroll > Bulk Salary Structure Assignment

Search or type a command (Ctrl + G)

Help

Bulk Salary Structure Assignment

UpdateAssign Structure

Set Assignment Details

Salary Structure \*

SS1

Company \*

Frappe

From Date \*

01-03-2024

Payroll Payable Account

Payroll Payable - F

Income Tax Slab

The Income Tax Slab (TITS)

Currency

INR

Quick Filters

Advanced Filters

Grade

In

Grade A, Grade B

values separated by commas

+ Add a Filter

Clear Filters

Select Employees

<input checked="" type="checkbox"/>	Employee	Name	Grade	Base	Variable
<input type="checkbox"/>					
<input checked="" type="checkbox"/>	HR-EMP-00004	Jornad	Grade A	10000	800
<input checked="" type="checkbox"/>	HR-EMP-00005	Joba	Grade B	8000	800
<input checked="" type="checkbox"/>	HR-EMP-00006	Moga	Grade A	10000	800

Salary Structure Assignments made using this tool will now be found in their list:

Payroll > Salary Structure Assignment

Search or type a command (Ctrl + G)

Help

Salary Structure Assignment

List ViewAdd Salary Structure Assignment

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

ID

Employee

Employee Name

Department

Designation

Salary Structure

Filter

Last Updated On

<input type="checkbox"/>	Employee Name	Status	Employee	Salary Structure	ID	3 of 3
<input type="checkbox"/>	Moga	Submitted	HR-EMP-00006	SS1	HR-SSA-24-03---	now 0
<input type="checkbox"/>	Joba	Submitted	HR-EMP-00005	SS1	HR-SSA-24-03---	now 0
<input type="checkbox"/>	Jornad	Submitted	HR-EMP-00004	SS1	HR-SSA-24-03---	now 0

### 3. Related Topics

1. Payroll Period
2. Income Tax Slab
3. Salary Component

4. [Salary Slip](#)
5. [Payroll Entry](#)

## Salary Slip

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

To access Salary Slip, go to: > Home > Human Resources > Payroll > Salary Slip

### 1. Prerequisites

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

- [Employee](#)
- [Salary Structure](#)
- [Salary Structure Assignment](#)

### 2. How to create a Salary Slip

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

### 3. Feature



### 3.1. Salary Slip based on Attendance/Leave

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

### 3.2. Salary Slip based on Timesheet

For creating Salary Slip based on timesheet you need to create Salary Structure for Timesheets.

DellSuite also provides an option to create Salary slip based on working hours based on [Timesheet](#). You can create Salary Slip after submitting the Timesheet by clicking directly on Create Salary Slip button on the top right.

The screenshot shows the DellSuite interface for a Timesheet entry. The top navigation bar includes 'Projects' and 'Timesheet'. A search bar is present with the text 'Search or type a command (Ctrl + G)'. The main header shows 'Anurag Mishra' with a 'Submitted' status and a document icon. Below this, there are two buttons: 'Create Sales Invoice' and 'Create Salary Slip', with the latter being highlighted by a red rectangle. The left sidebar contains various options: 'Comments' (0), 'Assigned To' (Assign +), 'Attachments' (Attach File +), 'Tags' (Add a tag ...), 'Reviews' (+), and 'Shared With' (+). The main content area displays 'EMPLOYEE DETAIL' for 'Anurag Mishra' (HR-EMP-00001) with a 'Submitted' status. It also shows the 'Start Date' as '04-02-2020' and 'End Date' as '06-02-2020'. The 'Department' is listed as 'Sales - F'.

The Payment Amount is calculated based on Hour Rate defined in Salary Structure and is reflected in the Earnings table.

### 3.3 Year to Date and Month to Date

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

Salary Slip

Search or type a command (Ctrl + G)

Settings Help

Rucha Mahabal Submitted

Sal Slip/HR-EMP-00001/00004 Menu Cancel

EARNING & DEDUCTION

Earnings

<input type="checkbox"/>	Component	Amount	
<input type="checkbox"/>	Basic	₹ 30,000.00	▼
<input type="checkbox"/>	House Rent Allowance	₹ 20,000.00	▼

Deductions

<input type="checkbox"/>	Component	Amount	
<input type="checkbox"/>	Income Tax	₹ 1,200.00	▼
<input type="checkbox"/>	Professional Tax	₹ 200.00	▼

Gross Pay (INR)

₹ 50,000.00

Total Deduction (INR)

₹ 1,400.00

Total Principal Amount

₹ 0.00

Total Loan Repayment

₹ 0.00

Total Interest Amount

₹ 0.00

NET PAY INFO

Net Pay (INR)

₹ 48,600.00

Rounded Total (INR)

₹ 48,600.00

Year To Date (INR)

₹ 97,200.00

Month To Date (INR)

₹ 48,600.00

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

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

Salary Slip
Search or type a command (Ctrl + G)
Settings
Help

Rucha Mahabal Submitted
Sal Slip/HR-EMP-00001/00004
Menu
Cancel

EARNING & DEDUCTION

Earnings

Component	Amount
Editing Row #1	
Component	Amount (INR)
Basic	₹ 30,000.00
	Year To Date (INR) ₹ 60,000.00 Total amount spent on this salary component from the beginning of the year (payroll or fiscal) to the current payroll date.
COMPONENT PROPERTIES AND REFERENCES	
Ctrl + Up, Ctrl + Down, ESC Insert Below	
House Rent Allowance	₹ 20,000.00

Deductions

Component	Amount
Income Tax	₹ 1,200.00
Professional Tax	₹ 200.00

Gross Pay (INR)  
₹ 50,000.00

Total Deduction (INR)  
₹ 1,400.00

### 3.4 Bulk Email Salary Slips

By default, the Payroll Entry sends salary slip emails to all the employees on salary slip submission if Email Salary Slip to Employee is enabled in Payroll Settings. Optionally, you can also set up the sender email account and email template for this.

Payroll > Payroll Settings
Search or type a command (Ctrl + G)
Help

Payroll Settings Not Saved
Save

Email

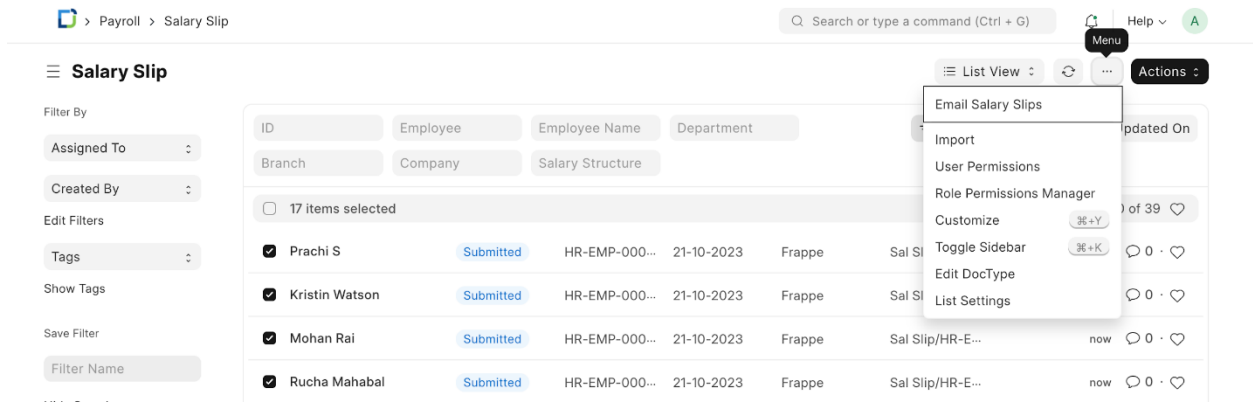
☒ Email Salary Slip to Employee  
Emails salary slip to employee based on preferred email selected in Employee

☐ Encrypt Salary Slips in Emails  
The salary slip emailed to the employee will be password protected, the password will be generated based on the password policy.

Sender

Email Template

But if there are a few employees who don't have an email ID set or the setup is incorrect during this action, you can use the bulk action in the Salary Slip list view to trigger sending emails to selected employees later.



## Payroll Entry

Payroll is the sum total of all compensation a business must pay to its employees for a set period of time or on a given date.

In DellSuite, Payroll Entry enables bulk processing of payroll for employees. In other words, processing salary slips of all employees in one go. The bulk processing can be Company-wide or based on these categories: Branch, Department, or Designation.

To access Payroll Entry, go to:

Home > Human Resources > Payroll > Payroll Entry

### 1. How to create a Payroll Entry

1. Go to to Payroll Entry list, click on New.
2. Select the Payroll Frequency.
3. Select Branch, Designation and Department to filter out employees (optional).

4. Select Project (optional) if you want to run the payroll against a project.
5. Select 'Validate Attendance' and 'Salary Slip Based on Timesheet' checkboxes in case you want to deduct the salary based on attendance and if you want to also consider the timesheets of the employees respectively.
6. Select the Payment Account to make the Bank Entry.
7. Save.

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

Once the list of Employees is fetched, click on the Create Salary Slips button to generate Salary Slips.

HR-PRUN-2020-00001 ● Draft

Shared With

You edited this just now

You created this 1 minute ago

SELECT EMPLOYEES

Posting Date

07-05-2020

Company

Test Company

Payroll Frequency

Monthly

EMPLOYEES

Branch

Designation

Department

Number Of Employees

2

Employee Details

<input type="checkbox"/>	Employee	Employee Name	Department	Designation	
<input type="checkbox"/>	1 HR-EMP-00002: Rahul	Rahul			▼
<input type="checkbox"/>	2 HR-EMP-00001: Nabin Baran Hait	Nabin Baran Hait			▼

Note: If the Salary Slips are already created, the system will not create any more Salary Slips. You can also just save the form as Draft and create the Salary Slips later.

## 2. Features

## 2.1 Salary Accrual

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

HR-PRUN-2021-00001

Draft

Get Employees

<

>

Print

...

Create Salary Slips

+

Tags

Add a tag ...

0

0

FOLLOW

You edited this

2 minutes ago

You created this

2 minutes ago

Select Employees

Posting Date \*

10-05-2021

Payroll Frequency \*

Monthly

Company \*

Unico Plastics Inc

Currency \*

INR

Exchange Rate \*

0.014000000

Payroll Payable Account \*

Cash In Hand - TC

Employees

Branch

Designation

Department

Number Of Employees

1

Employee Details

No.	Employee	Employee Name	Department	Designation	
<input type="checkbox"/>	1	HR-EMP-00001	Albert Einstein	Research & Developme...	Manager

Add Row

This will also book the default Payroll Payable account against respective Expense Heads (as configured in Salary Components) to record the accrual of salary to employees.

Cost Center:

You can select Cost Center in the Payroll Entry against which the expenses will be posted.

If you want to book expenses against multiple cost centers based on Employee/Department, you can do so by setting Payroll Cost Center in the Employee/Department master.

Employee > HR-EMP-00002

Search or type a command (Ctrl + G) | Help | A

Mohan Rai • Active

MR

Assigned To

Attachments

Attach File

Overview Joining Address & Contacts Attendance & Leaves **Salary** Personal Profile Exit Connections

Cost to Company (CTC)

10,00,000.00

Salary Currency

INR

Salary Mode

Payroll Cost Center

Main - F

PAN Number

Provident Fund Account

Save

Even multiple cost centers can be assigned against a single Employee. You can do so via the Salary Structure Assignment document.

Payroll > Salary Structure Assignment > HR-SSA-23-02-00001

Search or type a command (Ctrl + G) | Help | A

Rucha Mahabal • Submitted

Payroll Cost Centers

Cost Centers

<input type="checkbox"/>	No.	Cost Center *	Percentage (%) *	
<input type="checkbox"/>	1	Main - F	50	Edit
<input type="checkbox"/>	2	Engineering - F	50	Edit

Add Row

Cancel

Cost Center assigned in Salary Structure Assignment gets the highest priority and then Employee and Department master respectively. The least priority is given to the Cost Center selected in Payroll Entry.

Payroll Payable - UP
Journal Entry
ACC-JV-2019-00001
Menu
Cancel

Comments
0
Assigned To
Assign +
Attachments
Attach File +
Tags
Add a tag ...
Reviews
+
Shared With
+
You edited this a minute ago
You created this a minute ago

Entry Type
Journal Entry
Posting Date
18-07-2019
Company
Unico Plastics Inc.

Accounting Entries

	Account	Party	Debit	Credit	
<input type="checkbox"/>	1 Basic - UP		₹ 60,000.00	₹ 0.00	▼
<input type="checkbox"/>	2 House Rent Allowance - UP		₹ 30,000.00	₹ 0.00	▼
<input type="checkbox"/>	3 Professional Tax - UP		₹ 0.00	₹ 200.00	▼
<input type="checkbox"/>	4 Payroll Payable - UP		₹ 0.00	₹ 89,800.00	▼

User Remark
Accrual Journal Entry for salaries from 2019-07-01 to 2019-07-31
Total Debit
₹ 90,000.00
Total Credit
₹ 90,000.00
Multi Currency

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

## 2.2 Salary Payment

The final step is to book the Salary Payment.

Salaries in businesses are usually dealt with extreme privacy. In most cases, companies issue a single payment to the bank combining all salaries and the bank distributes the salaries to each employee's salary account.

This way there is only one payment entry in the company's books of accounts and anyone with access to the company's accounts will not have access to the individual salaries.



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

To generate your salary payment voucher from Payroll Entry, click on the Make Bank Entry button.

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

Cash - UP

Bank Entry

ACC-JV-2019-00002

Menu

Cancel

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Reviews

+

Shared With

+

You edited this a few seconds ago

You created this a minute ago

Bank Entry

18-07-2019

Company

Unico Plastics Inc.

Accounting Entries

	Account	Party	Debit	Credit	
<input type="checkbox"/>	1 Cash - UP		₹ 0.00	₹ 89,800.00	
<input type="checkbox"/>	2 Payroll Payable - UP		₹ 89,800.00	₹ 0.00	

Reference Number

1234567

Total Debit

₹ 89,800.00

Reference Date

19-07-2019

Total Credit

₹ 89,800.00

User Remark

Payment of salary from 2019-07-01 to 2019-07-31

Multi Currency

REFERENCE ^

Remark

Note: Payment of salary from 2019-07-01 to 2019-07-31  
Reference #1234567 dated 19-07-2019

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

### 3. Related Topics

1. [Salary Component](#)
2. [Salary Structure](#)
3. [Payroll Period](#)
4. [Journal Entry](#)

## Additional Salary

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

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

To access Additional Salary, go to:

Home > Human Resources > Payroll > Additional Salary

### 1. Prerequisites

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

- [Employee](#)
- [Salary Component](#)

### 2. How to create an Additional Salary

1. Go to the Additional Salary list, click on New.
2. Select Employee.
3. Select Salary Component.

4. Enter the Amount.
5. Enter the Payroll Date. If Payroll Date for Additional Salary is in the interval when the salary is processed, it will be added to the earnings/deduction.
6. Save and Submit.

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

The screenshot shows a web application interface for managing payroll. The main form is titled "HR-EMP-00001" and is in a "Submitted" state. The form is divided into two columns. The left column contains fields for "Employee" (HR-EMP-00001), "Employee Name" (Albert Einstein), "Salary Component" (Incentive), "Salary Component Type" (Earning), and "Amount" (₹ 3,000.00). The right column contains fields for "Company" (Unico Plastics Inc), "Department" (Research & Development - UP), "Currency" (INR), and "Payroll Date" (01-05-2021). Below these fields are three checkboxes: "Is Recurring" (unchecked), "Overwrite Salary Structure Amount" (checked), and "Deduct Full Tax on Selected Payroll Date" (unchecked). The left sidebar shows a list of navigation options: "Assigned To", "Attachments", "Reviews", "Shared With", and "Tags". The top of the page has a search bar and a help icon.

## 3.Features

### 3.1 Recurring Additional Salary

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

the employee. The Additional Salary will be repeated every month between 'From Date' and 'To Date' interval.

## 4. Related Topics

1. [Retention Bonus](#)
2. [Employee Incentive](#)
3. [Salary Structure](#)
4. [Salary Structure Assignment](#)
5. [Payroll Entry](#)
6. [Payroll Period](#)

## Retention Bonus

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

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

To access Retention Bonus, go to: > Home > Human Resources > Payroll > Retention Bonus

## 1. Prerequisites

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

- [Employee](#)
- [Salary Component](#)

## 2. How to create a Retention Bonus

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

Payroll > Retention Bonus > HR-RTB-2021-00001

Search or type a command (Ctrl + G) Help A

HR-RTB-2021-00001 Submitted

Assigned To

Attachments

Attach File

Reviews

Shared With

Tags

Add a tag ...

Company \*  
Unico Plastics Inc

Employee \*  
HR-EMP-00001

Bonus Payment Date \*  
01-09-2021

Bonus Amount \*  
₹ 5,000.00

Salary Component \*  
Arrear

Employee Name  
Albert Einstein

Department  
Research & Development - UP

Date of Joining  
2005-07-01

Currency \*  
INR

### 3. Related Topics

1. [Employee Incentive](#)
2. [Additional Salary](#)
3. [Salary Component](#)
4. [Salary Structure](#)
5. [Payroll Entry](#)

## Employee Incentive

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

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

To access Employee Incentive, go to: > Home > Human Resources > Payroll > Employee Incentive

## **1. Prerequisites**

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

- Employee
- Salary Component

## **1. How to create an Employee Incentive**

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

This will be fetched while running the Payroll Entry.

Human Resources > Employee Incentive

Search or type a command (Ctrl + G)

Settings Help

George Smith • Submitted

HR-EINV-20-01-00001

Menu Cancel

Comments0

Assigned ToAssign +

AttachmentsAttach File +

TagsAdd a tag ...

Reviews+

Shared With+

Employee

HR-EMP-00001: George Smith

Incentive Amount

₹ 5,000.00

Employee Name

George Smith

Additional Salary

HR-ADS-20-01-00002

Payroll Date

01-02-2020

Salary Component

Arrear

Add a comment

Comment

## 2. Related Topics

1. [Retention Bonus](#)
2. [Additional Salary](#)
3. [Salary Component](#)
4. [Salary Structure](#)
5. [Payroll Entry](#)

# Employee Tax and Benefits



## Setting Up Income Tax Deduction

Calculating Tax deductions for employees every month is a time-consuming activity for most businesses, especially for large enterprises. If set up properly, DellSuite HR simplifies most of the tax-related calculations by automatically calculating tax deductions while generating Salary Slips. Here's how you can configure DellSuite HR 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 spendings by individuals from being added to their annual taxable income. Examples of such spendings could be contributions to charitable institutions, the amount spent on the education of children, specific investments, etc. To avail the exemption from their taxable income, individuals are required to submit proof of such spendings.

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

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

Also, at the end of the year employees submit the actual proof of the spendings for filing via [Employee Tax Exemption Proof Submission](#). In the last payroll of the Payroll Period, DellSuite HR

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 spendings on particular categories decided by government or regulatory agencies. DellSuite HR 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

The screenshot shows the DellSuite HR interface for configuring an Employee Tax Exemption Category. The breadcrumb trail is: > Human Resources > Employee Tax Exemp... The search bar contains "Search or type a command (Ctrl + G)". The user is logged in as "HR Manager". The page title is "80C". The left sidebar shows "Comments" (0), "ASSIGNED TO" (Assign +), and "ATTACHMENTS" (Attach File +). The main form has a "Max Amount" field with the value "1,50,000.00" and a checkbox labeled "Is Active" which is checked. There is a "Save" button in the top right corner.

## Employee Tax Exemption Sub Category

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

You can configure Employee Tax Exemption Sub Category by going to, > Human resources > Payroll Setup > Employee Tax Exemption Sub Category > New Employee Tax Sub Exemption Category

The screenshot shows the DellSuite HR interface for configuring an Employee Tax Exemption Sub Category. The breadcrumb trail is: > Human Resources > Employee Tax Exemp... The search bar contains "Search or type a command (Ctrl + G)". The user is logged in as "HR Manager". The page title is "Life Insurance Premium". The left sidebar shows "Comments" (0), "ASSIGNED TO" (Assign +), and "ATTACHMENTS" (Attach File +). The main form has a "Tax Exemption Category" field with the value "80C", a "Max Amount" field with the value "1,50,000.00", and a checkbox labeled "Is Active" which is checked. There is a "Save" button in the top right corner.

## 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. DellSuite HR 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

DellSuite HR 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 DellSuite HR 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 DellSuite HR 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

## Income Tax Slab

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

## Salary Component

To enable automatic tax deduction based on Tax slabs configured in Income Tax Slab, you have to configure a Salary Component of type *Deduction* with *Variable Based On Taxable Salary* option enabled. This checkbox enables auto calculation of Income Tax considering the tax slabs and declaration submitted by an employee. The tax will be calculated annually on the remaining taxable salary and equally divide it in 12 months.

Important Note: If you configure condition and formula for this Deduction component, the condition and formula will be considered for calculating the Salary Component and the Tax Slabs configured in Income Tax Slab will be ignored. However, you can still use *Deduct Tax For Unsubmitted Tax Exemption Proof* option in Payroll Entry / Salary Slip to deduct taxes based on the Tax Slabs configured in Income Tax Slab, exempting Employee Tax Exemption Proof Submission which will give precedence to the Tax Slab based tax deduction. This is particularly helpful if you need to deduct a fixed amount as a deduction in each payroll rather than DellSuite

HR automatically calculating the deductions based on the projected annual salary of the employee after exemption as declared by the employee via [Employee Tax Exemption Declaration](#). At the end of the fiscal year, you can still use *Deduct Tax For Unsubmitted Tax Exemption Proof* to deduct the remaining tax liability of the employee for the whole period.

## Employee Tax Exemption Declaration

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

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

To access Employee Tax Exemption Declaration, go to:

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

### 1. Prerequisites

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

- [Employee](#)
- [Employee Tax Exemption Category](#)
- [Employee Tax Exemption Sub Category](#)

### 2. How to create Employee Tax Exemption Declaration

To create a new Employee Tax Exemption Declaration:

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

Payroll > Employee Tax Exemption Declaration > HR-TAX-DEC-2021-00001
Search or type a command (Ctrl + G)
Help

HR-TAX-DEC-2021-00001
Submitted
Submit Proof
<
>
Print
...
Cancel

Assigned To  
+  
Attachments  
Attach File +  
Reviews  
+  
Shared With  
+  
Tags  
Add a tag ...  
0 · 0 FOLLOW  
You edited this just now

Employee \*  
HR-EMP-00001  
Employee Name  
Albert Einstein  
Department  
Research & Development - UP

Payroll Period \*  
2021-22  
Company  
Unico Plastics Inc  
Currency \*  
INR

Declarations

No.	Exemption Sub Category	Exemption Category	Maximum Exempted ...	Declared Amount	
1	Mutual Funds	80c	₹ 1,50,000.00	₹ 2,00,000.00	Edit
2	Mediclaime	80D	₹ 50,000.00	₹ 30,000.00	Edit

Add Row

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.

## 3. Features

### 3.1 Employee Tax Exemption Category

Exemptions from taxable salary are usually restricted to spendings on particular categories decided by the Government or regulatory agencies. DellSuite HR allows you to configure various categories which are allowed to be exempted. Examples of these (for India) could be, 80G, 80C, 80CC etc.

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

The screenshot shows the configuration page for the '80D' Employee Tax Exemption Category. The breadcrumb trail is 'Payroll > Employee Tax Exemption Category > 80D'. The left sidebar contains 'Assigned To' (with a plus icon), 'Attachments' (with an 'Attach File' button and a plus icon), and 'Reviews' (with a plus icon). The main form area has a 'Max Exemption Amount' field set to '50,000.00' and an 'Is Active' checkbox that is checked. A 'Save' button is in the top right corner.

### 3.2 Employee Tax Exemption Sub-Category

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

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

The screenshot shows the configuration page for the 'Mutual Funds' Employee Tax Exemption Sub-Category. The breadcrumb trail is 'Payroll > Employee Tax Exemption Sub Category > Mutual Funds'. The left sidebar contains 'Assigned To' (with a plus icon), 'Attachments' (with an 'Attach File' button and a plus icon), and 'Reviews' (with a plus icon). The main form area has a 'Tax Exemption Category' field set to '80c', a 'Max Exemption Amount' field set to '1,50,000.00', and an 'Is Active' checkbox that is checked. A 'Save' button is in the top right corner.

### 3.3 HRA Exemption (Regional - India)

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

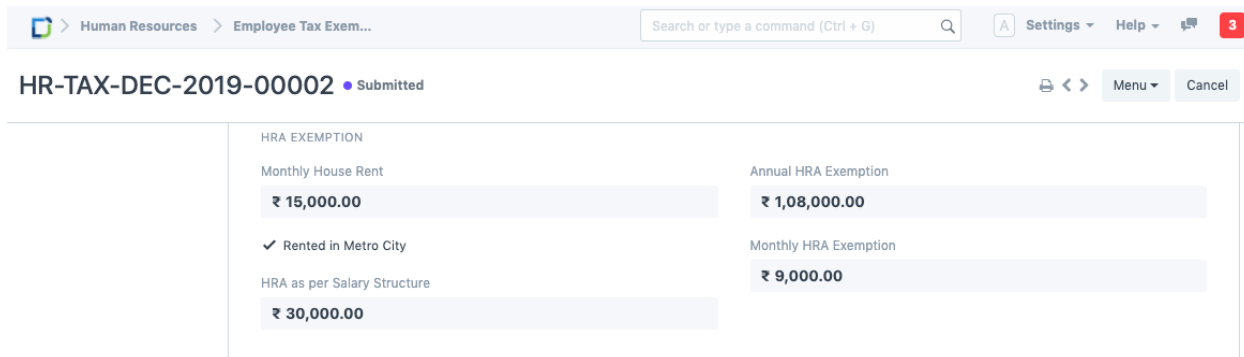
- The actual amount allotted by the employer as the HRA.
- Actual rent paid less 10% of the basic salary.

- 50% of the basic salary, if the employee is staying in a metro city (40% for a non-metro city).

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

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

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



The screenshot shows the DellSuite HR interface with the following details:

- Breadcrumbs:** Human Resources > Employee Tax Exem...
- Search Bar:** Search or type a command (Ctrl + G)
- Navigation:** Settings, Help, and a red notification badge with the number 3.
- Form Title:** HR-TAX-DEC-2019-00002 Submitted
- Form Fields:**
  - HRA EXEMPTION**
    - Monthly House Rent: ₹ 15,000.00
    - ☒ Rented in Metro City
    - HRA as per Salary Structure: ₹ 30,000.00
  - Annual HRA Exemption:** ₹ 1,08,000.00
  - Monthly HRA Exemption:** ₹ 9,000.00

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

## 4. Related Topics

1. [Employee Tax Exemption Proof Submission](#)
2. [Employee Benefit Application](#)
3. [Employee Benefit Claim](#)

## Employee Tax Exemption Proof Submission



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

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

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

To access Employee Tax Exemption Proof Submission, go to:

Home > Human resources > Employee Tax Exemption Proof Submission

## **1. How to create an Employee Tax Exemption Proof Submission**

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

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

> Payroll > Employee Tax Exemption Proof Submission > HR-TAX-PRF-2021-00001

Search or type a command (Ctrl + G)

Help

A

HR-TAX-PRF-2021-00001

Draft

Get Details From Declaration

<

>

Submit

0 · 0

FOLLOW

You edited this just now

You created this 2 minutes ago

Tax Exemption Proofs

<input type="checkbox"/>	No.	Exemption Sub Categ...	Exemption Category	Maximum Exemption ...	Type of Proof	Actual Amount	
<input type="checkbox"/>	1	Life Insurance Premium	80C	₹ 1,50,000.00	Policy Document	₹ 76,000.00	Edit
<input type="checkbox"/>	2	Mutual Funds	80C	₹ 1,50,000.00	Document	₹ 1,00,000.00	Edit
<input type="checkbox"/>	3	Mediclaime	80D	₹ 50,000.00	Insurance policy	₹ 20,000.00	Edit

Add Row

HRA Exemption

House Rent Payment Amount

3,60,000.00

Monthly House Rent

₹ 30,000.00

☒ Rented in Metro City

Monthly Eligible Amount

₹ 0.00

Rented From Date

01-01-2021

Total Eligible HRA Exemption

₹ 0.00

Rented To Date

31-12-2021

Total Actual Amount

₹ 5,56,000.00

Total Exemption Amount

₹ 1,70,000.00

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

## Regional - India

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

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

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

## **Employee Other Income**

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

Other income of an employee is also important to calculate the income tax liability of an employee.

In DellSuite HR, an employee can declare their other income using this document.

To access Employee Other Income, go to: > Home > Human Resources > Employee Tax and Benefits > Employee Other Income

### **1. How to create an Employee Other Income**

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

Payroll > Employee Other Income > HR-INCOME-000002

Search or type a command (Ctrl + G)

Help

HR-INCOME-000002

Draft

<

>

Print

More

Submit

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Submit this document to confirm

Employee \*

HR-EMP-00005

Employee Name

Michelle D'souza

Payroll Period \*

2021-22

Company \*

Unico Plastics Inc

Source

Capital gains on stock market

Amount \*

40,000.00

## 2. Related Topics

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

# 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
EBA00001
Menu
Cancel

Comments
0

ASSIGNED TO  
Assign +

ATTACHMENTS  
Attach File +

TAGS  
Add a tag ...

SHARED WITH  
+

HR Manager edited this  
9 days ago

Employee
EMP/00003: John
Date
20-06-2018

Employee Name
John
Payroll Period
2018-19

Max Benefits (Yearly)
₹ 1,00,000.00
Pro Rata Dispersed Amount
₹ 27,000.00

Remaining Benefits (Yearly)
₹ 73,000.00
Total Amount
₹ 27,000.00

<input type="checkbox"/>	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 anytime before the last payroll, use *Deduct Tax For Unclaimed Employee Benefits* in Payroll Entry / Salary Slip while processing the Salary.

## 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

The screenshot shows a web application interface for creating an Employee Benefit Claim. The breadcrumb navigation is 'Human Resources > Employee Benefit Cl...'. The title bar shows 'Hatsue Kashiwagi' with a 'Submitted' status. The form is divided into three main sections: 'Comments' on the left, 'Employee' details in the top middle, and 'Earning Component' details in the top right. The 'Employee' section includes fields for 'EMP/00001: Hatsue Kashiwagi', 'Employee Name: Hatsue Kashiwagi', and 'Claim Date: 29-06-2018'. The 'Earning Component' section includes 'Leave Travel Allowance', 'Max Amount Eligible: ₹ 1,00,000.00', and 'Claimed Amount: ₹ 70,000.00'. Below these is an 'Attachments' section with a file named '/files/travel\_and\_stay.png'. The left sidebar contains sections for 'Comments' (0), 'ASSIGNED TO' (Assign +), 'ATTACHMENTS' (travel\_and\_stay.png, Attach File +), 'TAGS' (Add a tag ...), and 'SHARED WITH'.

Comments	Employee	Earning Component
0	EMP/00001: Hatsue Kashiwagi	Leave Travel Allowance
ASSIGNED TO Assign +	Employee Name Hatsue Kashiwagi	Max Amount Eligible ₹ 1,00,000.00
ATTACHMENTS travel_and_stay.png Attach File +	Claim Date 29-06-2018	Claimed Amount ₹ 70,000.00
TAGS Add a tag ...	Attachments /files/travel_and_stay.png	
SHARED WITH		

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

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

Gratuity



# Gratuity

This Feature is introduced in Version 13, which will be part of a separate Payroll Module.

Gratuity is given by the employer to his/her employee for the services rendered by him/her during the period of employment. It is usually paid at the time of retirement but can be paid earlier, provided certain conditions are met.

In DellSuite HR you can manage Gratuity Payments of employee, based on different Gratuity Rule which vary from region to region.

To access the Gratuity go to:

Home > Payroll > Gratuity

## 1. Prerequisites

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

1. Employee
2. Gratuity Rule
3. Salary Component

## 2. How to create Gratuity

1. Got to Gratuity > New
2. Select Employee and Gratuity Rule. On selecting it will calculate Current Work Experience and Total Gratuity Amount based on Gratuity rule and relieving date.
3. Check checkbox Pay via Salary Slip. if you want gratuity payment through Salary Slip.
4. Save and Submit

Settings ▾
Help ▾
🗨
🔔

**HR-GRA-PAY-00005**
● Draft
🖨 < >
Menu ▾
Submit

**Assigned To**  
Assign +

**Attachments**  
Attach File +

**Tags**  
Add a tag ...

**Reviews**  
+

**Shared With**  
+

You edited this  
12 minutes ago

You created this  
12 minutes ago

Employee  
**HR-EMP-00003**

Employee Name  
**Shristi**

Department  
**Sales - F**

Designation  
**Analyst**

Posting date  
**03-12-2020**

Status  
**Draft**

Company  
**frappe**

Gratuity Rule  
**Indian Standard Gratuity Rule**

**PAYMENT CONFIGURATION**

☒ Pay via Salary Slip

Payroll Date  
**24-12-2020**

Salary Component  
**Gratuity payment**

Current Work Experience  
**21**

Total Amount  
**₹ 12,11,538.30**

## 3. Gratuity Payments Methods

In DellSuite HR, we allow you to pay the amount via Salary Slip or Payment Entry.

### 3.1 Payment via Salary Slip

To pay the Gratuity amount via Salary Slip you need to check the checkbox Pay via Salary Slip. Select Payroll Date and Salary Component, which will appear on Check.

Shared With

+

♥

You edited this  
4 minutes ago

You created this  
1 hour ago

PAYMENT CONFIGURATION

✓ Pay via Salary Slip

Payroll Date

24-12-2020

Salary Component

Gratuity payment

Current Work Experience

21

Total Amount

₹ 12,11,538.30

On Submit, it will automatically create Additional Salary with respective Payroll Date and Salary Component.

Additional Salary						
<div>Menu</div> <div>Refresh</div> <div>New</div>						
<div>VIEWS</div> <div>Reports</div> <div>List</div> <div>Dashboard</div> <div>Kanban</div> <div>FILTER BY</div> <div>Assigned To</div> <div>Created By</div> <div>Add Fields</div> <div>TAGS</div> <div>Tags</div> <div>Show Tags</div> <div>SAVE FILTER</div> <div>Filter Name</div>	<div> <div>Name</div> <div>Employee</div> <div>Salary Component</div> </div>					
	<div> <div>Add Filter</div> <div>Clear Filters</div> <div>Reference Document = HR-GR...</div> <div>Last Modified On</div> </div>					
	<div> <div>Employee</div> <div>Status</div> <div>Employee Name</div> <div>Salary Compon...</div> <div>1 of 1</div> </div>					
	<div> <div>HR-EMP-00003</div> <div>Submitted</div> <div>Shristi</div> <div>Gratuity payment</div> <div>0-12-00001</div> <div>now</div> <div>0</div> </div>					

## Payment via Payment Entry

To pay the Gratuity amount via Payment Entry you need to make sure that checkbox Pay via Salary Slip is unchecked. After that, it will allow you to select Payable Account, Expense Account, and Mode of Payment.

You edited this just now

You created this just now

PAYMENT CONFIGURATION

☐ Pay via Salary Slip

Payable Account  
**Payroll Payable - F**

Expense Account  
**Salary - F**

Mode of Payment  
**Cash**

Cost Center  
**Main - F**

Current Work Experience  
**9**

Total Amount  
**₹ 5,19,230.70**

Paid Amount  
**₹ 0.00**

After Submitting the record click on the button "Create Payment Entry" which will redirect you to the Payment Entry Form fill in the details, save, and submit.

New Payment Entry 1 Not Saved Save

ACCOUNTS ▾

AMOUNT  
 Paid Amount (INR)  
**5,19,230.70**

REFERENCE  
[Get Outstanding Invoice](#)  
 Payment References
 

<input type="checkbox"/>	Type	Name	Total Amount	Outstanding	Allocated	
<input type="checkbox"/> 1	Gratuity	HR-GRA-PAY-00006	5,19,230.700	5,19,230.700	5,19,230.700	▾

Add Row

WRITEOFF  
 Total Allocated Amount (INR)  
**₹ 5,19,230.70**

Unallocated Amount (INR)  
 0.00

Difference Amount (INR)  
**₹ 0.00**

# Gratuity Rule

This Feature is introduced in Version 13, which will be part of separate Payroll Module.

Gratuity Rule are set of rule defined by Central or State used during calculation of Gratuity Amount

In DellSuite HR, you can define different Gratuity Rules based on different Region.

To access the Gratuity Rule, go to:

Home > Payroll > Gratuity Rule

## 1. Prerequisites

Before creating a Gratuity Rule, it is advised to create the following:

1. Employee
2. Salary Component

## 2. How to create Gratuity Rule

1. Got to Gratuity Rule > New
2. Select Applicable Components. These Salary Components contribute during Gratuity Calculation.
3. Select "Calculate Gratuity Amount based on"
4. Define Gratuity Rule
5. Save

Rule Under Unlimited Contract on resignatio...

Not Saved

Menu

Save

Comments

0

Assigned To

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Reviews

+

Shared With

+

You edited this

1 hour ago

You created this

1 month ago

Applicable Earnings Component

Basic x

Arrear x

Salary components should be part of the Salary Structure.

Work Experience Calculation method

Round off Work Experience

Total working Days Per Year

365

Disable

Calculate Gratuity Amount Based On

Sum of all previous slabs

Minimum Year for Gratuity

1

GRATUITY RULES

Leave From and To 0 for no upper and lower limit.

Current Work Experience

	From(Year)	To(Year)	Fraction of Applicable Earnings	
<input type="checkbox"/> 1	0	1	0	
<input type="checkbox"/> 2	1	3	0.233	
<input type="checkbox"/> 3	3	5	0.467	
<input type="checkbox"/> 4	5	0	0.700	

Add Row

## 3. Additional Properties

Some of the additional attributes used while gratuity Calculation are define below.

### 3.1 Work Experience Calculation method:

DellSuite HR provide two different method for calculation of Work experience.

1. Round off Work Experience method Round off yor current experience. For example, if employee have total experience of 3 year and 6 month will be treated as 4 year experience.
2. Take Exact Completed Year.

### 3.2 Calculate Gratuity Amount Based On:

Let's consider the following example to understand the calculation.

## Rule Under Unlimited Contract on re...

Menu
Save

Shared With

+

You edited this  
50 minutes ago

You created this  
1 month ago

GRATUITY RULES

Leave From and To 0 for no upper and lower limit.

Current Work Experience

<input type="checkbox"/>	From(Year)	To(Year)	Fraction of Applicable E...	
<input type="checkbox"/> 1	0	1	0	▼
<input type="checkbox"/> 2	1	3	0.233	▼
<input type="checkbox"/> 3	3	5	0.467	▼
<input type="checkbox"/> 4	5	0	0.700	▼

Add Row

- Current slab: If Gratuity Amount calculation is based on Current Slab, then amount will be the product of Work Experience (in years), Fraction of Applicable Earnings and summation of the Applicable Earnings Components. Based on above Gratuity Rules/slab, if an employee has an experience of 5 years, then it falls in third slab. The calculation of Gratuity Amount will be as follows:

Gratuity amount = 5 0.467 (Arrear + Basic)

- Sum of all previous slabs: If Gratuity Amount calculation is based on Sum of all previous slabs, then amount will be the summation of product of individual slabs up to the year of experience and summation of Applicable Earnings Component. Based on above Gratuity Rules/slab, if an employee has an experience of 5 years, then the calculation of Gratuity Amount will be as follows:

Gratuity amount = [(1 0) + (2 0.233) + (2 0.467)](Arrear + Basic)

# Loans



# Loan Type

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

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

To access Loan Type go to:

Human Resources > Loans > Loan Type

## 1. How to create a Loan Type

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

> Loan Management > Loan Type > Demand Loan

Search or type a command (Ctrl + G)

Help

A

Demand Loan

Submitted

<

>

🖨

⋮

Cancel

+

Shared With

+

Tags

Add a tag ...

0 - 0

FOLLOW

You edited this just now

You created this 7 minutes ago

Maximum Loan Amount

₹ 2,00,000.00

Rate of Interest (%) Yearly \*

13.5%

Penalty Interest Rate (%) Per Day

25%

Penalty Interest Rate is levied on the pending interest amount on a daily basis in case of delayed repayment

Grace Period in Days

5

No. of days from due date until which penalty won't be charged in case of delay in loan repayment

Auto Write Off Amount

0.00

Loan Write Off will be automatically created on loan closure request if pending amount is below this limit

Company \*

Unico Plastics Inc

☒ Is Term Loan

☐ Disabled

Account Details

Mode of Payment \*

Cash

Payment Account \*

Cash - UP

Loan Account \*

HDFC - UP

Interest Income Account \*

Sales - UP

Penalty Income Account \*

Service - UP

## 2. Related Topics

1. [Loan Application](#)
2. [Loan](#)

## Loan Application

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

Employee can apply for loan by going to:

## 1. Prerequisites

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

- Employee
- Loan Type

## 2. How to create a Loan Application

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

Arvind Goyal

Submitted

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⚙

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Cancel

+

Attachments

Attach File

+

☆

Reviews

+

👤

Shared With

+

🏷

Tags

Add a tag ...

♥ 0

💬 0

FOLLOW

You edited this just now

You created this just now

Connections

Loan

+

Loan Security Pledge

+

Applicant Type \*

Customer

Company \*

Unico Plastics Inc

Applicant \*

Arvind Goyal

Posting Date

17-05-2021

Status

Open

⋮

Loan Info

Loan Type \*

Demand Loan

☐

Is Term Loan

Loan Amount

₹ 2,00,000.00

☒

Is Secured Loan

Rate of Interest

13.5%

Loan Security Details

Proposed Pledges

<input type="checkbox"/> No.	Loan Security	Quantity	Loan Security Price	Amount	
<input type="checkbox"/> 1	INFY	100	₹ 5,000.00	₹ 5,00,000.00	<a href="#">Edit</a>

Add Row

Maximum Loan Amount

₹ 2,50,000.00

## 3. Features

### 3.1 Repayment Method

There are two types of Repayment Methods in Loan Application:

#### 1. Repay Fixed Amount Per Period

- Enter the Monthly Payment Amount.
- Save.

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

Human Resources > Loan Application
Search or type a command (Ctrl + G)
Settings Help 76

HR-EMP-00001 Submitted ACC-LOAP-2019-00001 Menu Cancel

REPAYMENT INFO	
Repayment Method <b>Repay Fixed Amount per Period</b>	Monthly Repayment Amount <b>₹ 10,000.00</b>
Rate of Interest <b>10%</b>	Repayment Period in Months <b>4</b>
Total Payable Interest <b>₹ 510.00</b>	Total Payable Amount <b>₹ 30,510.00</b>

## 2. Repay Over Number Of Periods

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

Human Resources > Loan Application
Search or type a command (Ctrl + G)
Settings Help 76

HR-EMP-00002 Submitted ACC-LOAP-2019-00002 Menu Cancel

REPAYMENT INFO	
Repayment Method <b>Repay Over Number of Periods</b>	Monthly Repayment Amount <b>₹ 1,047.00</b>
Rate of Interest <b>10%</b>	Repayment Period in Months <b>10</b>
Total Payable Interest <b>₹ 463.00</b>	Total Payable Amount <b>₹ 10,463.00</b>

## 4. Related Topics

1. [Loan Type](#)
2. [Loan](#)

## Loan

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

To access Loan, go to:

Human Resources > Loans > Loan

### 1. Prerequisites

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

- [Loan Type](#)
- [Loan Application](#)
- [Chart of Accounts](#)

### 2. How to create a Loan record

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

ACC-LOAN-2019-00001

Submitted

Menu

Cancel

+

Shared With

+

You edited this a few seconds ago

You created this 18 hours ago

Applicant Type

Employee

Applicant

HR-EMP-00001

Applicant Name

George Smith

Loan Application

ACC-LOAP-2019-00001

Loan Type

Medical

Posting Date

22-08-2019

Company

Unico Plastics Inc.

Status

Sanctioned

Repay from Salary

LOAN DETAILS

Loan Amount

₹ 30,000.00

Rate of Interest (%) / Year

10%

Repayment Start Date

01-09-2019

Repayment Method

Repay Fixed Amount per Period

Repayment Period in Months

4

Monthly Repayment Amount

₹ 10,000.00

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

ACC-LOAN-2019-00001
Submitted

Menu
Cancel

ACCOUNT INFO
^

Mode of Payment

Cheque

Payment Account

HDFC - UP

Loan Account

Loan - UP

Interest Income Account

Interest - UP

REPAYMENT SCHEDULE

Repayment Schedule

	Payment Date	Principal Amount	Interest Amount	Total Payment	Balance Loan Amo...		
<input type="checkbox"/>	1	01-09-2019	₹ 9,750.00	₹ 250.00	₹ 10,000.00	₹ 20,250.00	▼
<input type="checkbox"/>	2	01-10-2019	₹ 9,831.00	₹ 169.00	₹ 10,000.00	₹ 10,419.00	▼
<input type="checkbox"/>	3	01-11-2019	₹ 9,913.00	₹ 87.00	₹ 10,000.00	₹ 506.00	▼
<input type="checkbox"/>	4	01-12-2019	₹ 506.00	₹ 4.00	₹ 510.00	₹ 0.00	▼

TOTALS

Total Payment

₹ 30,510.00

Total Interest Payable

₹ 510.00

Total Amount Paid

₹ 0.00

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

You can alternatively create a Loan record directly from [Loan Application](#)

## 3. Features

### 3.1 Creation of Disbursement Entry

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



**Loan - UP**
Bank Entry

ACC-JV-2019-00005
Menu
Cancel

Assigned To  
Assign +
Attachments  
Attach File +
Tags  
Add a tag ...
Reviews  
+
Shared With  
+

You edited this  
18 hours ago
You created this  
18 hours ago

Entry Type  
**Bank Entry**

Posting Date  
**22-08-2019**

Company  
**Unico Plastics Inc.**

Accounting Entries

	Account	Party	Debit	Credit	
<input type="checkbox"/>	1 <b>Loan - UP</b>	HR-EMP-00002	<b>₹ 10,000.00</b>	<b>₹ 0.00</b>	▼
<input type="checkbox"/>	2 <b>HDFC - UP</b>		<b>₹ 0.00</b>	<b>₹ 10,000.00</b>	▼

Reference Number  
**1234567890**

Reference Date  
**01-09-2019**

User Remark  
Against Loan: ACC-LOAN-2019-00002

Total Debit  
**₹ 10,000.00**

Total Credit  
**₹ 10,000.00**

Multi Currency

## 3.2 Loan repayment deduction from Salary

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

Human Resources
Salary Slip

Search or type a command (Ctrl + G)
Settings
Help

test\_employee@loan.com
Submitted
Sal Slip/EMP-00007/00002
Menu
Cancel

LOAN REPAYMENT

Employee Loan

	Loan	Loan Account	Interest Income Ac...	Principal Amount	Interest Amount	
<input type="checkbox"/>	1 <b>ACC-LOAN-2019-...</b>	Loan Account - _TC	Interest Income Acc...	<b>₹ 13,092.00</b>	<b>₹ 1,960.00</b>	▼
<input type="checkbox"/>	2 <b>ACC-LOAN-2019-...</b>	Loan Account - _TC	Interest Income Acc...	<b>₹ 0.00</b>	<b>₹ 304.87</b>	▼

Total Principal Amount  
**₹ 13,092.00**

Total Interest Amount  
**₹ 2,264.87**

Total Loan Repayment  
**₹ 15,356.87**

## 3.3 Extending the Loan

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

## **4. Related Topics**

1. [Journal Entry](#)
2. [Payroll Entry](#)

# Setup

# 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).

Check [Setup](#) for more details on each of masters, global *HR Settings* and other configurations.

## Leave Setup

To setup Leaves, create:

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

You can read [Leaves](#) for a detailed description about how you can configure and manage Leaves.

## Payroll (Salary) Setup

In DellSuite HR, 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 DellSuite HR simplifies most of the payroll processing for you.

Read more about setting up your payroll and how DellSuite HR simplifies payroll processing in [Salary and Payroll](#).

If you intend to configure DellSuite HR 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. DellSuite HR 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* DellSuite HR will validate the open positions and current employment count with the Staffing Plan.

## **HR Settings**

HR Settings allow global settings for HR-related documents.

To access HR Settings, go to: > Home > Human Resources > Settings > HR Settings

There are various settings available in the HR Settings.

### **1. Employee Settings**

HR Settings

Assigned To

Attachments

Attach File

Reviews

Shared With

Retirement Age

60

Enter retirement age in years

Employee Records to be created by

✓ Naming Series  
Employee Number  
Full Name

Stop Birthday Reminders

Don't send employee birthday reminders

Expense Approver Mandatory In Expense Claim

Leave Settings

## 1.1. Retirement Age:

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

## 1.2 Employee Records to be created by

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

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

## 1.3 Stop Birthday Reminders

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

## 1.4 Expense Approver Mandatory In Expense Claim

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

Payroll Settings will be part of HR Settings till version 12. In version 13, Payroll Settings will be part of the new module, Payroll.

## 2. Payroll Settings

The screenshot shows the 'HR Settings' page with a 'Not Saved' indicator. The 'Payroll Settings' section is active. On the left, there's a sidebar with 'Shared With' and a list of recent edits. The main content area is divided into two columns. The left column contains settings for 'Calculate Payroll Working Days Based On' (set to 'Leave'), 'Max working hours against Timesheet' (set to '0.000'), and checkboxes for 'Include holidays in Total no. of Working Days' (checked) and 'Disable Rounded Total' (unchecked). The right column contains 'Daily Wages Fraction for Half Day' (set to '0.500'), checkboxes for 'Email Salary Slip to Employee' (checked) and 'Encrypt Salary Slips in Emails' (checked), and a 'Password Policy' field with a template '{first\_name}{date\_of\_birth.year}' and an example 'SAL-{first\_name}-{date\_of\_birth.year}'.

HR Settings Not Saved Menu Save

**PAYROLL SETTINGS**

Calculate Payroll Working Days Based On

Max working hours against Timesheet

☒ 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

☐ Disable Rounded Total  
If checked, hides and disables Rounded Total field in Salary Slips

Daily Wages Fraction for Half Day  
  
The fraction of daily wages to be paid for half-day attendance

☒ Email Salary Slip to Employee  
Emails salary slip to employee based on preferred email selected in Employee

☒ Encrypt Salary Slips in Emails  
The salary slip emailed to the employee will be password protected, the password will be generated based on the password policy.

Password Policy  
  
Example: SAL-{first\_name}-{date\_of\_birth.year}  
This will generate a password like SAL-Jane-1972

### 2.1 Calculate Payroll Working Days Based On

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

### 2.2 Max working hours against Timesheet

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

### 2.3 Include holidays in Total no. of Working Days

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

### 2.4 Disable Rounded Total

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

## **2.5 Daily Wages Fraction for Half Day**

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

## **2.6 Email Salary Slip to Employee**

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

## **2.7 Encrypt Salary Slips in Emails**

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

## **2.8 Password Policy**

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

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

Example:

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

This will generate a password like SAL-Jane-1972

## **3. Shift Settings**



☒ Allow Multiple Shift Assignments for Same Date

Enabling this allows the user to create Shift Assignments for an employee with pre-existing Assignments on any of the dates within the selected range, and vice versa.

> HR > HR Settings

Search or type a command (Ctrl + G)

Help A

≡ HR Settings

... Save

♥ 0 · 💬 0 FOLLOW

You edited this  
3 days ago

You created this  
1 month ago

Leave Settings ^

☒ Send Leave Notification

Leave Approval Notification Template \*

Leave Status Notification Template \*

Leave Approval Notification

Leave Status Notification

☒ Leave Approver Mandatory In Leave Application

☐ Show Leaves Of All Department Members In Calendar

☐ Auto Leave Encashment

☐ Restrict Backdated Leave Application

☐ Automatically Allocate Leaves Based On Leave Policy

Hiring Settings ^

☐ Check Vacancies On Job Offer Creation

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

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

### **4.3 Leave Approver Mandatory In Leave Application**

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

### **4.4 Show Leaves Of All Department Members In Calendar**

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

### **4.5 Auto Leave Encashment**

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

### **4.6 Restrict Backdated Leave Application**

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

Introduced in version 13

### **4.7 Automatic Allocate Leaves Based On Leave Policy**

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

## **5. Hiring Settings**

**Hiring Settings** ^

☐ Check Vacancies On Job Offer Creation

☒ Send Interview Reminder

Interview Reminder Notification Template \*

Interview Reminder

Remind Before

00:30:00

☒ Send Interview Feedback Reminder

Feedback Reminder Notification Template \*

Interview Feedback Reminder

## 5.1 Check Vacancies On Job Offer Creation

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

## 5.2 Send Interview Reminder

Enabling this will send a reminder email to all the Interviewers associated with the Interview Round of an upcoming Interview. This mail will be scheduled according to the Remind Before field set by the user.

## 5.2 Send Interview Feedback Reminder

Enabling this option will trigger reminder emails to be sent to Interviewers who are associated with a conducted Interview Round but haven't yet submitted their Feedback for it.

# 6. Mobile Settings

## 6.1 Allow Employee Checkin from Mobile App

Enabling this will allow Employees to check-in from the mobile app. It is enabled by default.

# Payroll Settings

Payroll Settings allow you to configure global settings for the Payroll module.

To access Payroll Settings, go to: > Home > Payroll > Settings > Payroll Settings

## 1. Working Days & Hours

The screenshot shows the 'Payroll Settings' page in a web application. The breadcrumb trail at the top is 'Payroll > Payroll Settings'. A search bar and a 'Help' link are also visible. On the left, there is a sidebar with options: 'Assigned To' (with an 'Add Assignee' button), 'Attachments' (with an 'Add File' button), 'Reviews' (with a '+' button), and 'Shared With' (with an 'Invite' button). The main content area is titled 'Payroll Settings' and contains a 'Working Days and Hours' section. This section has two columns of settings. The first column includes: 'Calculate Payroll Working Days Based On' (set to 'Attendance'), 'Consider Unmarked Attendance As' (set to 'Present'), and two checked checkboxes: 'Include holidays in Total no. of Working Days' and 'Consider Marked Attendance on Holidays'. The second column includes: 'Max working hours against Timesheet' (set to '0.00'), 'Fraction of Daily Salary for Half Day' (set to '0.50'), and a descriptive text: 'The fraction of daily wages to be paid for half-day attendance'. A 'Save' button is located at the top right of the settings area.

### 1.1 Calculate Payroll Working Days Based On

Working Days in Salary Slip can be calculated based on Leave Application or Attendance records.

### 1.2 Consider Unmarked Attendance As

If you set payroll based on Attendance, this option will be shown. It allows you to control the status of unmarked attendance. Eg: If you set it as Present, you don't need to explicitly mark attendance for every employee throughout the month. Just mark the absent days and the rest would be considered as Present by default.

### 1.3 Include holidays in Total no. of Working Days

If checked, the total number of working days will include holidays, and this will reduce the value of salary per day. Eg: If there are 10 holidays in a 30-day month, the Total Working Days will be considered as 30 if this checkbox is enabled and 20 if disabled. Then attendance will be checked for these 30/20 days to find out the payment days.

## 1.4 Consider Marked Attendance on Holidays

By default, holidays are considered as paid days. If this is enabled and you mark attendance on a holiday, the marked attendance will override holiday status on that day. Eg: if you mark an employee as Absent on a holiday, it will be counted as an absent day and not a paid one.

## 1.5 Max working hours against Timesheet

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

## 1.6 Fraction of Daily Salary for Half Day

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

# 2. Salary Slip

Salary Slip	
<input checked="" type="checkbox"/> Disable Rounded Total	<input checked="" type="checkbox"/> Show Leave Balances in Salary Slip
If checked, hides and disables Rounded Total field in Salary Slips	

## 2.1 Disable Rounded Total

If enabled, hides and disables Rounded Total field in Salary Slips

## 2.2 Show Leave Balances in Salary Slip

# 3. Email

Email	
<input checked="" type="checkbox"/> Email Salary Slip to Employee	<input type="checkbox"/> Encrypt Salary Slips in Emails
Emails salary slip to employee based on preferred email selected in Employee	The salary slip emailed to the employee will be password protected, the password will be generated based on the password policy.

### 3.1 Email Salary Slip to Employee

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

### 3.2 Encrypt Salary Slips in Emails

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

### 3.3 Password Policy

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

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

Example:

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

This will generate a password like SAL-Jane-1972

## 4. Other Settings

Other Settings	
<input checked="" type="checkbox"/> Define Opening Balance for Earning and Deductions	<input checked="" type="checkbox"/> Process Payroll Accounting Entry based on Employee
If checked, then the system will enable the provision to set the opening balance for earnings and deductions till date while creating a Salary Structure Assignment (if any)	If checked, Payroll Payable will be booked against each employee

### 4.1 Define Opening Balance for Earning and Deduction

If enabled, it will allow you to set up opening entries for Taxable Earnings till Date and Tax Deducted till Date in the Salary Structure Assignment if there are no existing salary slips for the employee.

The screenshot shows the 'Salary Structure Assignment' form for employee 'Rucha Mahabal'. The form is titled 'Rucha Mahabal' with a 'Submitted' status. The left sidebar contains navigation options: 'Assigned To' (with a plus icon), 'Attachments' (with an 'Attach File' button), 'Reviews' (with a plus icon), 'Shared With' (with a plus icon), 'Tags' (with an 'Add a tag ...' button), and a 'FOLLOW' button. The main form area is divided into several sections: 'Employee \*' (HR-EMP-00001), 'Salary Structure \*' (Timesheet Based Structure), 'Company \*' (Frappe), 'Employee Name' (Rucha Mahabal), 'From Date \*' (01-01-2023), 'Payroll Payable Account' (Payroll Payable - F), 'Department' (Research & Development), 'Designation' (Engineer), 'Currency \*' (INR), 'Base & Variable' (Base: ₹ 83,334.00, Variable: ₹ 0.00), 'Earnings and Taxation' (Taxable Earnings Till Date: 4,65,788.00, Tax Deducted Till Date: 42,498.00), and 'Payroll Cost Centers' (with a dropdown arrow).

Base & Variable	
Base	Variable
₹ 83,334.00	₹ 0.00

Earnings and Taxation	
Taxable Earnings Till Date	Tax Deducted Till Date
4,65,788.00	42,498.00

## 4.2 Process Payroll Accounting Entry based on Employee

By default, a consolidated Journal Entry is created against the Payroll Entry for all the employees. If you want a better breakup of payroll amounts per employee, enable this to process employee-wise accounting entries.

Accounting > Journal Entry > ACC-JV-2022-00028

Search or type a command (Ctrl + G) Help

**Payroll Payable - FT** • Journal Entry

View Actions < > Print ... Cancel

Assigned To +

Attachments Attach File +

Shared With +

Tags Add a tag ...

0 0 FOLLOW

You edited this 14 minutes ago

You created this 14 minutes ago

Entry Type \* Journal Entry

Company \* Frappe Tech

Posting Date \* 01-12-2022

Accounting Entries							
	No.	Account *	Party Type	Party	Debit	Credit	
	1	HRA - FT			₹ 72,400.00	₹ 0.00	Edit
	2	SA - FT			₹ 1,44,800.00	₹ 0.00	Edit
	3	Basic - FT			₹ 1,44,800.00	₹ 0.00	Edit
	4	TDS on Salary - FT			₹ 0.00	₹ 67,859.00	Edit
	5	Professional Tax - FT			₹ 0.00	₹ 400.00	Edit
	6	Provident Fund - FT			₹ 0.00	₹ 3,600.00	Edit
	7	Payroll Payable - FT	Employee	HR-EMP-00001	₹ 0.00	₹ 1,41,512.00	Edit
	8	Payroll Payable - FT	Employee	HR-EMP-00002	₹ 0.00	₹ 1,48,629.00	Edit

User Remark

Accrual Journal Entry for salaries from 2022-12-01 to 2022-12-31

Total Debit ₹ 3,62,000.00

Total Credit ₹ 3,62,000.00

## Daily Work Summary Group

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

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

Human Resources > Settings > Daily Work Summary Group

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

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

### 1. Prerequisites



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

- Email Account

## 2. How to create a Daily Work Summary Group

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

### Note:

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

HR > Daily Work Summary Group > Daily Work Summary Group For Frappe

Search or type a command (⌘ + K)

Help

A

Daily Work Summary Group For Frappe

Enabled

Daily Work Summary

Save

☒ Enabled

Select Users

Users

<input type="checkbox"/>	No.	User	
<input type="checkbox"/>	1	kristin@frappe.io	
<input type="checkbox"/>	2	mike@frappe.io	

Add Row

Send Emails At17:00

Holiday ListRevised Holiday List 2023

Reminder

SubjectWhat did you work on today?

Message

Normal

---

B I U S I<sub>x</sub> A

Table

Please share what did you do today. If you reply by midnight, your response will be recorded!

Assigned To

Attachments

Reviews

Tags

Share

A

# Reports

# Human Resources Reports

## 1. Employee Leave Balance

> HR

Q Search or type a command (Ctrl + G)

Help

A

Employee Leave Balance

Create CardSet Chart

01-09-2020	31-03-2022	Frappe	Department	Employee			
Leave Type	Employee	Employee ...	Opening Balance	Leave Allocated	Leave Taken	Leave Expired	Closing Balance
1 > Casual Leave							
21 > Compensatory Off							
41 > Leave Without Pay							
61 > Privilege Leave							
81 v Sick Leave							
82		Olivia House	0	0	0	0	0
83		Robert House	0	0	0	0	0
84		Ram	0	0	0	0	0
85		Test Emp	0	0	0	0	0
86		Jennifer Co...	0	10	0	10	0
87		Ananya B	0	0	0	0	0
88		test duplica...	0	0	0	0	0
89		Edward Jon...	0	0	0	0	0
90		Isha Joshi	0	0	0	0	0
91		Floyd Miles	0	0	0	0	0
92		Amy Parsons	0	0	0	0	0
93		Tanisha Ra	0	0	0	0	0

## 2. Salary Register

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

## Salary Register

Create Card

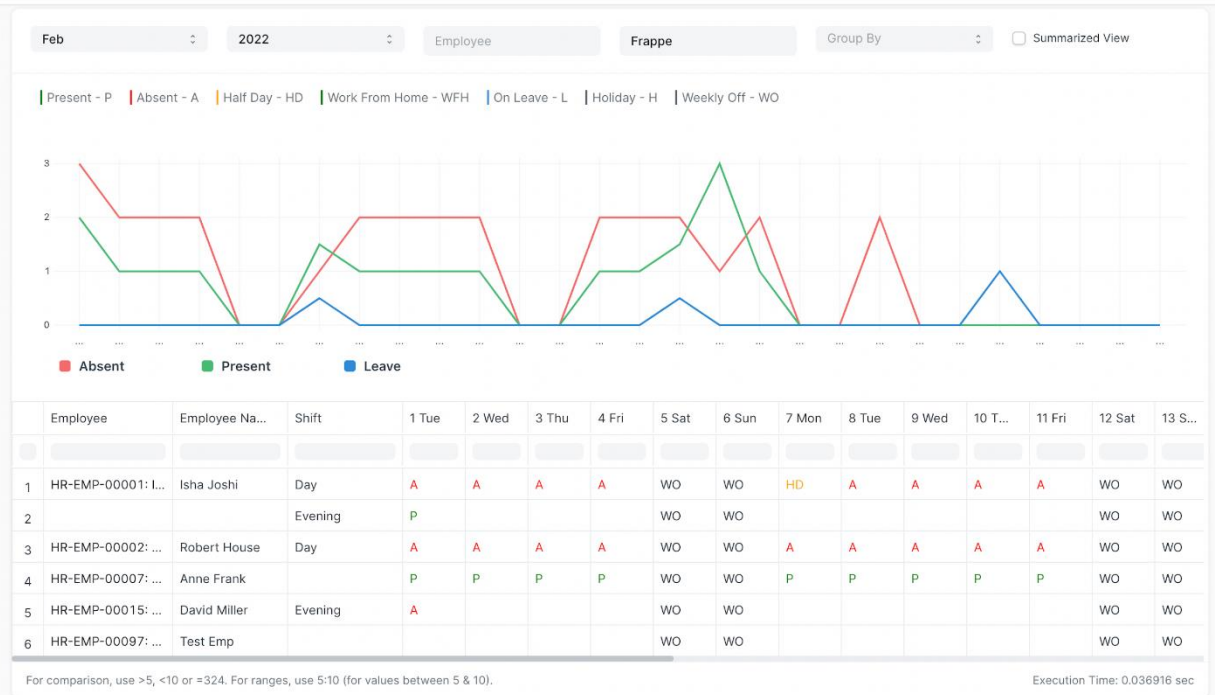
Set Chart



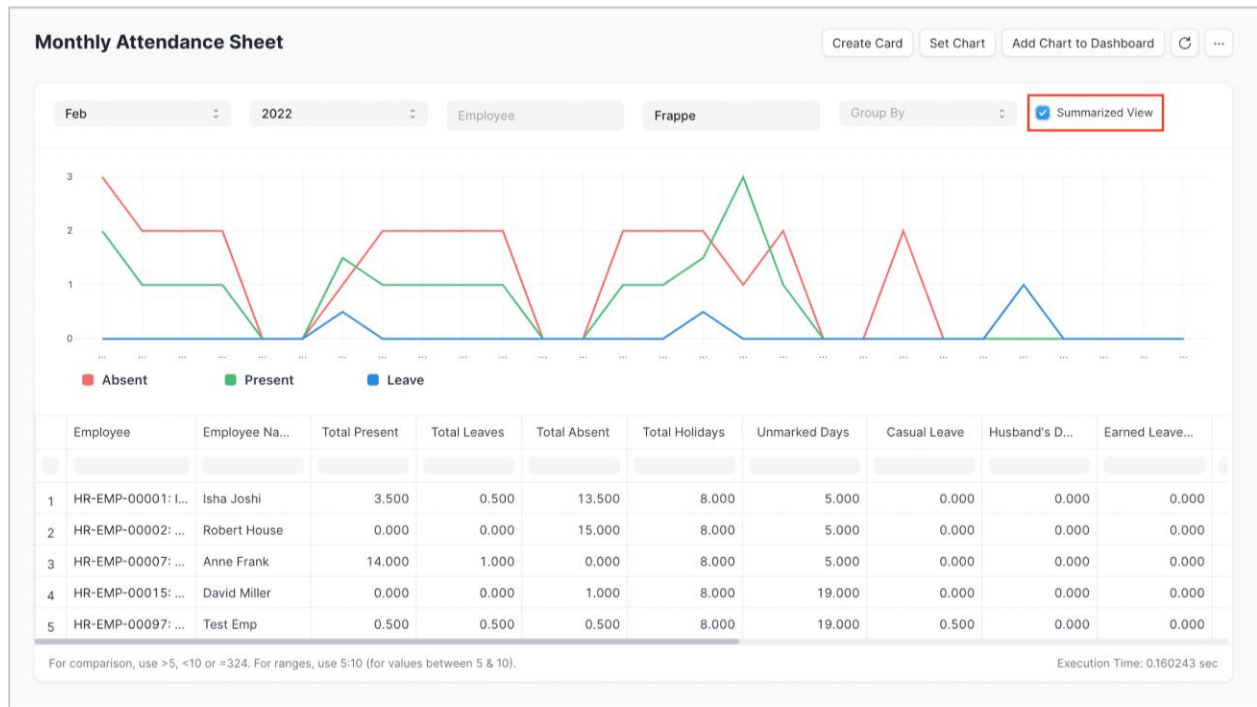
01-05-2021		07-12-2021		INR		Employee		Frappe		Submitted			
	Employee	Employee Name	Date o...	B...	D...	Designation	Company	Start D...	End Da...	L...	Payment Days	Basic	Professional ...
-00...	HR-EMP-0000...	Robert House	2020-0...				Frappe	2021-0...	2021-0...	0.000	1.000	₹ 20,000.00	₹ 4,600.00
-00...	HR-EMP-0009...	Ananya B	2016-0...				Frappe	2021-1...	2021-1...	0.000	20.000	₹ 28,571.43	
										0.000	21.000	₹ 48,571.43	₹ 4,600.00
For comparison, use >5, <10 or =324. For ranges, use 5:10 (for values between 5 & 10).													
Execution Time: 0.005939 sec													

### 3. Monthly Attendance Sheet

Monthly Attendance Sheet shows you the employee-wise attendance status. If you assign shifts to employees, this sheet will also show you shift-wise attendance for each employee.



If you do not want to see day-wise attendance, and get a summarized view of total absent, present, leave days, etc. you can switch to the summarized view:



This will show you:

- Total Present Days
- Total Absent Days
- Total Leave Days
- Total Holidays
- Total Unmarked Days
- Number of leaves taken per leave type
- Total Late Entries
- Total Early Exits

You can also view the report grouped by Department, Branch, Designation, or Employee Grade.

## 4. Shift Attendance

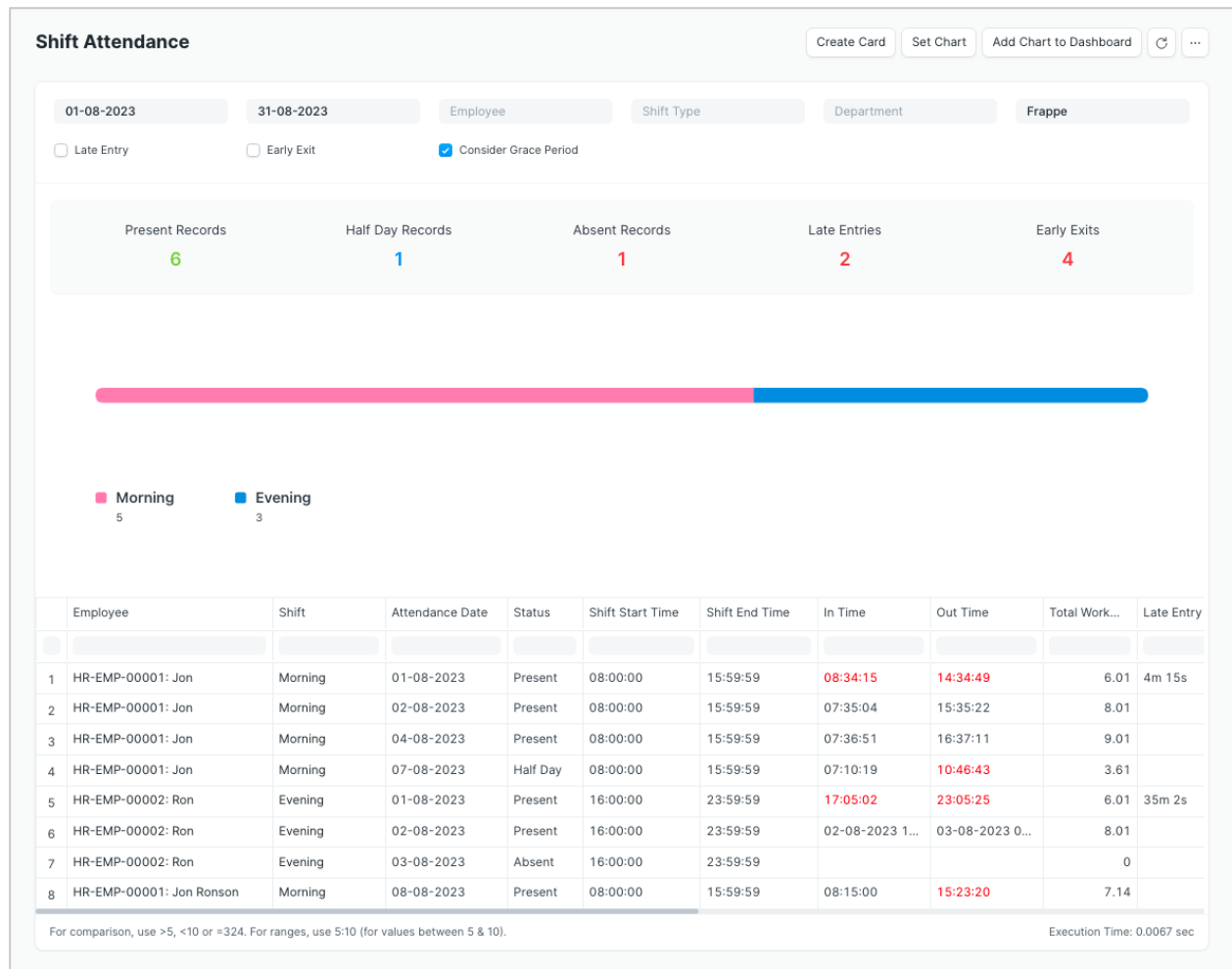
Introduced in Version 15

Shift Attendance presents and summarizes attendance details for marked shifts:

- Attendance Details: Employee, Date, Status, In/Out Time, Total Working Hours, Time by which Entry is Late or Exit is Early
- Shift Details: Shift Name, Shift Start/End Time, Shift Actual Start/End Time

Entries can be further filtered on the basis of:

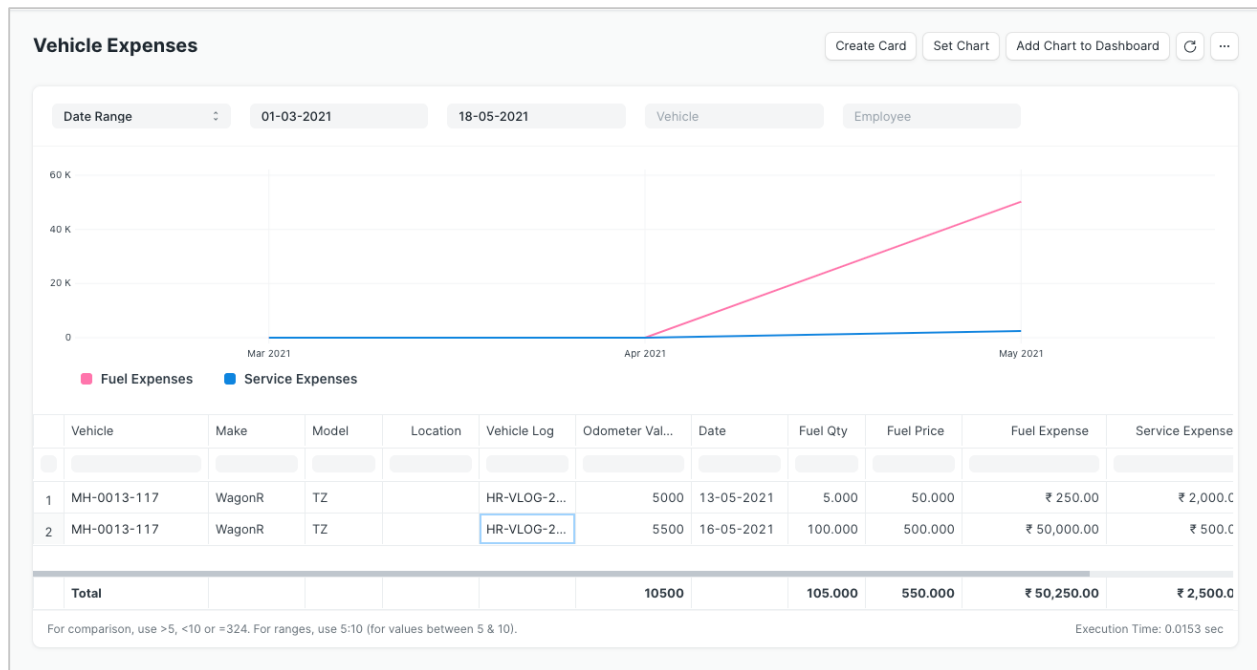
- Shift Type
- Late Entry
- Early Exit



## 5. 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.





## 6. Employee Exits

Introduced in Version 14

This report gives a summary of Employee Exits:

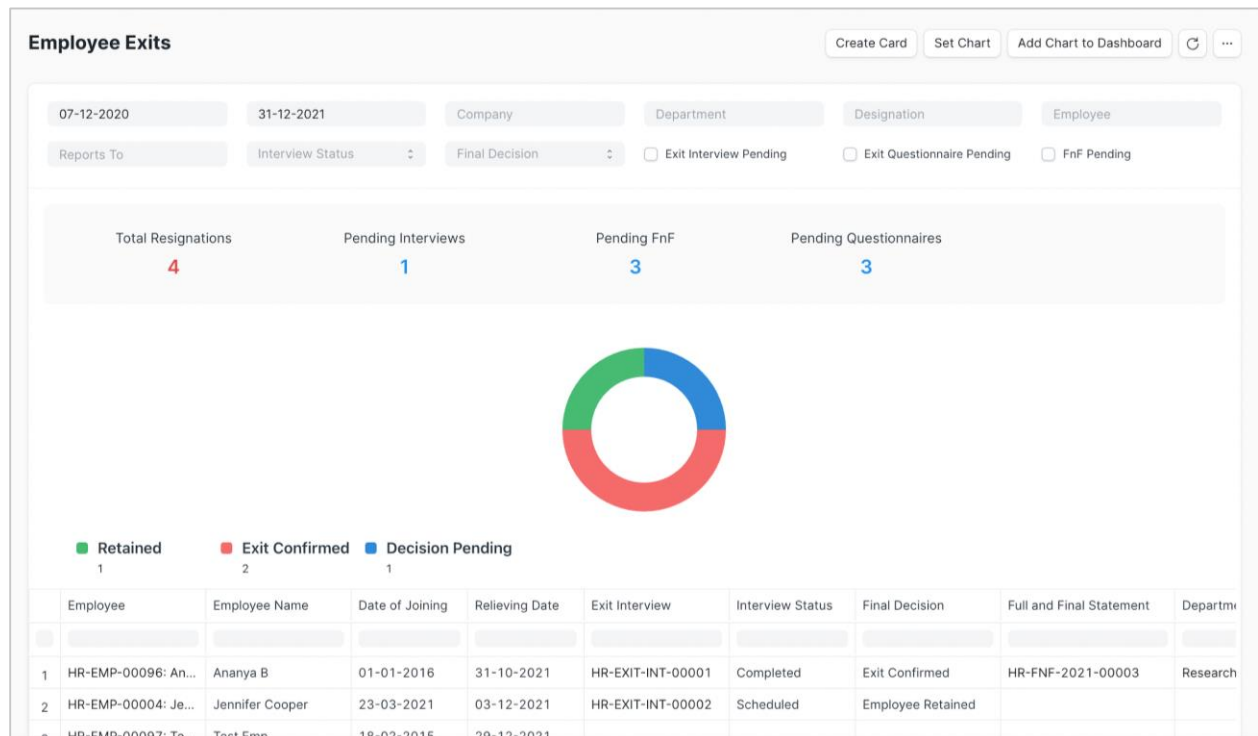
- Employee Details: Employee, Reports to, Date of Joining, Relieving Date, Department, Designation
- Exit Interview
- Interview Status (Pending/Scheduled/Completed)
- Final Decision (Employee Retained/Exit Confirmed)
- Full and Final Statement

This report also provides extra filters for:

- Interview Pending
- Questionnaire Pending

- FnF Pending

Users can set up auto email reports on the above filters to make pending exit tracking easier.



## 7. Employee Birthday

Employee Birthday Report shows month-wise birthdays of your Employees.

**Employee Birthday** Create Card Set Chart 🔄 ...

Dec Frappe

	Employee	Name	Date of Bi...	Branch	Department	Designation	Ge...	Company
1	HR-EMP-00001	Isha Joshi	08-12-1998		Research & De...	CEO	Female	Frappe
2	HR-EMP-00002	Robert House	27-12-1994			Marketer	Male	Frappe
3	HR-EMP-00003	Olivia House	01-12-1990			VP Sales	Female	Frappe
4	HR-EMP-00006	Agatha	08-12-1998			Engineer	Female	Frappe
5	HR-EMP-00007	Anne Frank	21-12-1998			Engineering Le...	Female	Frappe
6	HR-EMP-00008	Tanisha Ramani	08-12-1998		Research & De...	Engineering Le...	Female	Frappe

## 8. Employee working on a holiday

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

Employees working on a holiday						Create Card	Set Chart		
01-01-2021		31-12-2021		Holiday List					
	Employee	Name	Date	Status	Holiday				
1	HR-EMP-00006	Agatha	28-03-2021	On Lea...	Sunday				
2	HR-EMP-00006	Agatha	03-04-2021	On Lea...	Saturday				
3	HR-EMP-00006	Agatha	04-04-2021	On Lea...	Sunday				
4	HR-EMP-00001	Isha Joshi	01-08-2021	Present	Sunday				
5	HR-EMP-00001	Isha Joshi	07-08-2021	Present	Saturday				
6	HR-EMP-00001	Isha Joshi	08-08-2021	Present	Sunday				
7	HR-EMP-00001	Isha Joshi	14-08-2021	Present	Saturday				
8	HR-EMP-00001	Isha Joshi	15-08-2021	Present	Sunday				
9	HR-EMP-00001	Isha Joshi	21-08-2021	Absent	Saturday				
10	HR-EMP-00001	Isha Joshi	22-08-2021	Absent	Sunday				
11	HR-EMP-00001	Isha Joshi	28-08-2021	Absent	Saturday				
12	HR-EMP-00001	Isha Joshi	29-08-2021	Absent	Sunday				
13	HR-EMP-00096	Ananya B	01-08-2021	Present	Sunday				
14	HR-EMP-00096	Ananya B	07-08-2021	Present	Saturday				
15	HR-EMP-00096	Ananya B	08-08-2021	Present	Sunday				
16	HR-EMP-00096	Ananya B	14-08-2021	Present	Saturday				
17	HR-EMP-00096	Ananya B	15-08-2021	Present	Sunday				

## 9. Bank Remittance Report

This report helps you to track bank transactions of payroll entries between companie(s) and employees. It shows the transaction between the bank accounts of the Company and the Employee with the Payment Date.

Frappe								
	Payroll Number	Debit A/C Number	Payment Date	Employee Name	Employee A/C Number	Bank Code	Currency	Net Salary Amount
1	HR-PRUN-2019-00001		25-03-2019	HR-EMP-00001: Anurag Mishra	1234567890123	GHAT000001	INR	₹ 10,00,00,000.0
2	HR-PRUN-2019-00001		25-03-2019	HR-EMP-00002: Anurag Pandey	9876543210987	GHAT000001	INR	₹ 10,00,00,000.0
3	HR-PRUN-2019-00002		25-03-2019	HR-EMP-00001: Anurag Mishra	1234567890123	GHAT000001	INR	₹ 10,00,00,000.0
4	HR-PRUN-2019-00002		25-03-2019	HR-EMP-00002: Anurag Pandey	9876543210987	GHAT000001	INR	₹ 10,00,00,000.0
For comparison, use >5, <10 or =324. For ranges, use 5:10 (for values between 5 & 10).							Execution Time: 0.1 sec	

## **10. Loan Repayment Report**

Loan Repayment Report allows you to keep a track of loans by showing the loan amount, interest, payable amount, and EMI. It also shows the paid and outstanding amount.

HR articles


# User Permission based on Hierarchy

Question:

How to configure User Permissions, so that an Employee can view his Expense Claims, and also of ones who report to him/her?

Answer:

In the Employee master, for each Employee, you can define who does he/she reports to. Based on the Reports To defined, the Employee hierarchy is built as well.

 > Human Resources > Employee

Search or type a command (Ctrl + G)

**Reema Mehta** ● Active

You edited this  
in 2 minutes

You created this  
3 minutes ago

52.61MB (0%) used

JOINING DETAILS ▾

DEPARTMENT AND GRADE ▴

Department

Human Resources - RI

Designation

HR Manager

Reports to

HR-EMP-00005

Grade

Branch

## Employee Hierarchy

Also, once a User is linked with the Employee, it creates a User Permission as follows. As per this User Permission, Employee will be allowed to review his/her own document created in the HR module + the document which are created for Employees reporting to him/her.

## Employee Tree

Reliance Industries



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

Setup > User Permission

Search or type a command (Ctrl + G)

kenneth@relianceind.test

Comments0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag ...

SHARED WITH

+

♥

User

kenneth@relianceind.test

Allow

Employee

For Value

HR-EMP-00003

ADVANCED CONTROL

☒ Apply To All Document Types

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

## Setting Employee-wise Leave Approver

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

Steps:

- 1) Go to the Employee's master.
- 2) In "Attendance and Leave Details" section, select the Leave Approver for that particular Employee.



Human Resources > Employee

Search or type a command (Ctrl + G)

Settings Help

Michelle Alva • Active

HR-EMP-00012 Menu Save

JOINING DETAILS

DEPARTMENT AND GRADE

Department

Marketing - BB

Grade

Designation

Branch

Reports to

HR-EMP-00005

ATTENDANCE AND LEAVE DETAILS

Leave Policy

HR-LPOL-2020-00001

Holiday List

Attendance Device ID (Biometric/RF tag ID)

Applicable Holiday List

Default Shift

Leave Approver

nshah@test.com

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

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

Human Resources
>
Leave Application

Search or type a command (Ctrl + G)

Settings
Help

Michelle Alva
• Draft

HR-LAP-2020-00002
Menu
Submit

Assign +
Attachments
Attach File +
Tags
Add a tag ...
Reviews
+
Shared With
+
You edited this a few seconds ago
You created this a few seconds ago
45.08MB (0%) used

Employee
HR-EMP-00012
Employee Name
Michelle Alva

Leave Type
Casual Leave
Leave Balance Before Application
11

From Date
23-01-2020
To Date
24-01-2020
☐ Half Day
Total Leave Days
2

Reason

Leave Approver
nshah@test.com
Leave Approver Name
Nitin Shah

Status
Open
Salary Slip

Posting Date
23-01-2020
☒ Follow via Email
Company
Blue Bird
Letter Head

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

However, the default Leave Approver will always be the one set in the Employee master.

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

Marketing - BB

Enabled

Menu

Save

Comments0

Assigned ToAssign +

AttachmentsAttach File +

TagsAdd a tag ...

Reviews+

Shared With+

♥

You edited this42 minutes ago

Simran Monteiro created this5 months ago

45.08MB (0%) used

DepartmentMarketing

Parent DepartmentAll Departments

CompanyBlue Bird

☐ Is Group

☐ Disabled

Leave Block List

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.

Leave Approver

<input type="checkbox"/>	Approver	
<input type="checkbox"/>	1simran@iwebnotes.com	

Add Row

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

Michelle Alva

Not Saved

HR-LAP-2020-00002

Menu

Save

Attachments

Attach File +

Tags

Add a tag ...

Reviews

+

Shared With

+

You edited this 17 minutes ago

You created this 17 minutes ago

45.08MB (0%) used

HR-EMP-00012

Casual Leave

Employee Name

Michelle Alva

Leave Balance Before Application

11

From Date

23-01-2020

To Date

24-01-2020

☐ Half Day

Total Leave Days

2

Reason

Leave Approver

nshah@test.com

Nitin, Shah

simran@iwebnotes.com

Simran, Monteiro

Filters applied for Employee = HR-EMP-00012, Doctype = Leave Application

+ Create a new User

Advanced Search

Status

Open

Salary Slip

Company

Blue Bird

Letter Head

Berkey Creamery

## Department-wise Leave Approval in DellSuite

Any user with role, "Leave Approver" should be only able to access leave applications of those employees that belong in their department. This is a common use-case in most companies, and with some quick configurations, we can achieve it in DellSuite.

In company "SX4", let's consider Chris as the Leave Approver for department, "Research And Development". With this configuration, Chris will only be able to view Leave Applications raised by his department.

1. Under Role Permissions Manager, provide this role with access of Department DocType



## Role Permissions Manager

Set User Permissions

Department

Leave Approver

Document Type	Role	Level	Permissions	
Department	Leave Approver <input type="checkbox"/> Only If Creator	0	<input checked="" type="checkbox"/> Read <input type="checkbox"/> Delete <input type="checkbox"/> Report <input type="checkbox"/> Set User Permissions	<input type="checkbox"/> Write <input type="checkbox"/> Print <input type="checkbox"/> Import <input type="checkbox"/> Share
			<input type="checkbox"/> Create <input type="checkbox"/> Email <input checked="" type="checkbox"/> Export	<input type="checkbox"/> x

- Create the user in DellSuite with Role as "Leave Approver", and Employee In our example, this is Chris.

Chris ● Active

HR-EMP-00007

Menu

Save

ERPNext User ▴

User ID

chris@abx.in

System User (login) ID. If set, it will become default for all HR forms.

☐ Create User Permission

This will restrict user access to other employee records

JOINING DETAILS ▾

DEPARTMENT AND GRADE ▴

Department

Research & Development - S4

Grade

Designation

Branch

Reports to

Keep this unchecked.

- Now, create the necessary user permissions as per Company, Department, and Employee.

User Permission

Menu

Refresh

New

Reports

List

Calendar

Kanban

Assigned To Me

SAVE FILTER

Filter Name

TAGS

Add / Update

Bulk Delete

ID

chris@abx.in

Allow

For Value

Add Filter

Last Modified On

<input type="checkbox"/>	User	Allow	For Value	Applicable For	2 of 2
<input type="checkbox"/>	chris@abx.in	Company	SX4	6796375d84 19 m	0
<input type="checkbox"/>	chris@abx.in	Department	Research & Develop...	2da3357eb3 22 m	0

While adding the "Employee" permission for Chris, just keep Leave Application unchecked, so that Chris has access to only view other employees.

#### 4. Department: Set a "Leave Approver" in the Department master

Human Resources > Department

Search or type a command (Ctrl + G)

Jai Chavan

Help

99+

Research & Development - S4

Enabled

Menu

Save

Comments

0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag ...

SHARED WITH

+

You edited this

4 minutes ago

You created this

6 months ago

70.88MB (0%) used

Department

Research & Development

Parent Department

All Departments

Company

SX4

☐ Is Group

☐ Disabled

Leave Block List

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 chris@abx.in	

Add Row

Now, let's say, we have an employee called Pepper who works in the "Research and Development" Department.

**Pepper**
Active

HR-EMP-00004

Menu

Save

You created this 4 months ago

70.88MB (0%) used

JOINING DETAILS

DEPARTMENT AND GRADE

Department

Research & Development - S4

Grade

Designation

Branch

Reports to

6. Pepper fills in a leave application.

**Pepper**
Draft

HR-LAP-2019-00007

Menu

Save

Comments 0

ASSIGNED TO  
**Assign +**

ATTACHMENTS  
**Attach File +**

TAGS  
Add a tag ...

SHARED WITH  

+

You edited this 14 minutes ago

You created this 15 minutes ago

70.88MB (0%) used

Employee  
HR-EMP-00004

Employee Name  
Pepper

Leave Type  
Sick Leave

Department  
Research & Development - S4

Leave Balance Before Application  
3

From Date  
04-07-2019

To Date  
05-07-2019

☐ Half Day

Total Leave Days  
2

Reason

Leave Approver  
chris@abx.in

Leave Approver Name  
Chris

Status  
Open

Salary Slip

7. When the Leave Approver, Chris, logs in, he can only access the leaves raised by employees of his department.





## Using Auto Attendance

DellSuite allows us to Mark Attendance automatically depending upon the Employee Checkin records.

A. Create or import Employee Checkin:

Employee	Time
<b>HR-EMP-00001</b>	<b>09-06-2020 20:28:36</b>
Employee Name	Location / Device ID
<b>Anurag Mishra</b>	
Log Type	<input type="checkbox"/> Skip Auto Attendance
<b>OUT</b> ▼	Attendance Marked
Shift	<b>HR-ATT-2020-00012</b>
<b>Day</b>	

1. Set the time carefully for log type IN and OUT.
2. For Log Type IN time should be greater than Shift Type Start Time - Begin check-in before shift time
3. For Log Type OUT time should be less Than Shift Type End Time + Allow check-out after shift end time.
4. Then only Shift would be mapped properly and your Checkin is valid.

B. Check your shift type:

Day
Menu
Save

Start Time
10:45:26

End Time
20:45:26

Holiday List
Holiday 2020

☒ Enable Auto Attendance
Mark attendance based on 'Employee Checkin' for Employees assigned to this shift.

AUTO ATTENDANCE SETTINGS

Determine Check-in and Check-out
Alternating entries as IN and OUT during the shift

Working Hours Calculation Based On
First Check-in and Last Check-out

Begin check-in before shift start time (in minutes)
60
The time before the shift start time during which Employee Check-in is considered for attendance.

Allow check-out after shift end time (in minutes)
60
Time after the end of shift during which check-out is considered for attendance.

Working Hours Threshold for Half Day
3.0
Working hours below which Half Day is marked. (Zero to disable)

Working Hours Threshold for Absent
1.0
Working hours below which Absent is marked. (Zero to disable)

Process Attendance After
01-06-2020
Attendance will be marked automatically only after this date.

Last Sync of Checkin
09-06-2020 22:00:27
Last Known Successful Sync of Employee Checkin. Reset this only if you are sure that all Logs are synced from all the locations. Please don't modify this if you are unsure.

1. Set Process Attendance After (Attendance will be marked Only after this date)
2. Set Last Sync of Checkins (It is the time before which all the checkin records will be considered. Note: If it is less than shift end Time then it will not consider that day's checkin because it means that shift is not over yet)

C. Click on Mark Auto Attendance to check whether it is working

Note: The scheduler will run the process to mark attendance automatically every hour. But after uploading or creating check-ins you need to check your Process Attendance After and Last Sync of Checkin in Shift Type.

## Configuring Earned Leave

### 1. Prerequisites

Before configuring Earned Leaves, it is required that you create the following first:

- Leave Type

HR > Leave Type > Privilege Leave

Search or type a command (Ctrl + G)

Help

A

Privilege Leave

Assigned To

Attachments

Tags

Share

0

0

FOLLOW

You last edited this - just now

You created this - 3 weeks ago

Connections

Maximum Leave Allocation Allowed

0.000

Applicable After (Working Days)

0

Maximum Consecutive Leaves Allowed

0

Is Carry Forward

Is Leave Without Pay

Is Partially Paid Leave

Is Optional Leave

These leaves are holidays permitted by the company however, availing it is optional for an Employee.

Allow Negative Balance

Allow Over Allocation

Allows allocating more leaves than the number of days in the allocation period.

Include holidays within leaves as leaves

Is Compensatory

Encashment

Earned Leave

Is Earned Leave

Earned Leave Frequency

Monthly

Allocate on Day

First Day

The day of the month when leaves should be allocated

Rounding

0.5

- Leave Period

HR > Leave Period > HR-LPR-2023-00001

Search or type a command (Ctrl + G)

Help

HR-LPR-2023-00001

< > ⌂ ⋮ Save

Assigned To +

Attachments +

Tags +

Share +

0 · 0 FOLLOW

Connections

From Date \*01-01-2024

To Date \*31-12-2024

☒ Is Active

Company \*Frappe

Holiday List for Optional Leave

- Leave Policy

HR > Leave Policy > HR-LPOL-2023-00001

Search or type a command (Ctrl + G)

Help

Leave Policy 2024 Submitted

< > ⌂ ⋮ Cancel

Assigned To +

Attachments +

Tags +

Share +

0 · 0 FOLLOW

Connections

Title \*Leave Policy 2024

Leave Allocations

Leave Policy Details

<input type="checkbox"/>	No.	Leave Type *	Annual Allocation *	
<input type="checkbox"/>	1	Privilege Leave	22	Edit

- Leave Policy Assignment

HR > Leave Policy Assignment > HR-LPOL-ASSGN-00001

Search or type a command (Ctrl + G)

Help

Akash Submitted

< > ⌂ ⋮ Cancel

Assigned To +

Attachments +

Tags +

Share +

0 · 0 FOLLOW

Connections

Employee \*HR-EMP-00001

Employee nameAkash

CompanyFrappe

Leave Policy \*HR-LPOL-2023-00001

☐ Add unused leaves from previous allocations

Assignment based onLeave Period

Leave Period \*HR-LPR-2023-00001

Effective From \*01-01-2024

Effective To \*31-12-2024

## 2. How to Configure Earned Leaves

1. Creating a Leave Policy Assignment will result in the creation of associated Leave Allocations. These allocations will be automatically updated with leaves at intervals set by 'Earned Leave Frequency'.

The screenshot displays a user interface for managing leave allocations for Adam Roy. The page is titled 'Adam Roy Submitted' and includes a 'View Ledger' button and navigation controls. On the left, there is a sidebar with options: Assigned To, Attachments, Reviews, Tags, and Share. The main content area is divided into sections: 'Connections' (with links to Compensatory Leave Request, Leave Encashment, and Employee Leave Balance), 'Employee' details (HR-EMP-00014: Adam Roy), 'Leave Type' (Privilege Leave), 'Employee Name' (Adam Roy), 'From Date' (01-01-2024), 'Department' (Human Resources), 'To Date' (31-12-2024), 'Company' (Frappe), and 'Allocation' (New Leaves Allocated: 36.00, Total Leaves Allocated: 36). There is also a checkbox for 'Add unused leaves from previous allocations'.

Adam Roy Submitted View Ledger < > ⌵ ⌵ Cancel

Assigned To + Attachments + Reviews + Tags + Share +

0 · 0 FOLLOW

You last edited this · 3 months ago

You created this · 4 months ago

**Connections** ^

Compensatory Leave Request + Leave Encashment +

Employee Leave Balance

Employee \* HR-EMP-00014: Adam Roy

Leave Type \* Privilege Leave

Employee Name Adam Roy

From Date \* 01-01-2024

Department Human Resources

To Date \* 31-12-2024

Company \* Frappe

**Allocation**

New Leaves Allocated 36.00

☐ Add unused leaves from previous allocations

Total Leaves Allocated \* 36

## Leave Calculation In Salary Slip

There are two types of leave which user can apply for.

- Paid Leave (Sick Leave, Privilege Leave, Casual Leave etc.)
- Unpaid Leave

Paid Leave are firstly allocated by HR manager. As and when Employee creates Leave Application, leaves allocated to him/her are deducted. These leaves doesn't have impact on the employee's Salary Slip.

When Employee is out of paid leave, he create Leave Application for unpaid leave. The term used for unpaid leave in DellSuite is Leave Without Pay (LWP). These leaves does have impact on the Employee's Salary Slip.

Just marking Absent in the Attendance record do not have impact on salary calculation of an Employee, as that absenteeism could be because of paid leave. Hence creating Leave Application should be created incase of absenteeism. Let's consider a scenario to understand how leaves impact employees Salary Slip. 1. Setup Employee 1. Allocate him paid leaves 1. Create Salary Structure for that Employee. In the Earning and Deduction table, select which component of salary should be affected if Employee takes LWP. 1. Create Holiday List (if any), and link it with Employee master.

Working Days: Working Days in Salary Slip are calculated based on number of days selected above. If you don't wish to consider holiday in Working Days, then you should do following setting. > Human Resource > Setup > HR Setting Uncheck field "Include Holidays in Total No. of Working Days"

Holidays are counted based on Holiday List attached to the Employee's master. Leave Without Pay: Leave Without Pay is updated based on Leave Application made for this Employee, in the month for which Salary Slip is created, and which has Leave Type as "Leave Without Pay". Payment Days:

Following is how Payment Days are calculated:  $\text{Payment Days} = \text{Working Days} - \text{Leave Without Pay}$  If you have LWP checked for the Salary Component, there will be reduction in Amount based on no. of LWP of an Employee for that month.

## **How to encash unused leaves using Salary Slips**

Encashment of unused leaves into an Employee's Salary Slip can be done easily by following the steps given below

1. Enable 'Allow Encashment' for the Leave Type which will be of Encashment type.

HR > Leave Type > Casual Leave

Search or type a command (Ctrl + G) Help VM

### Casual Leave

Encashment ^

☒ Allow Encashment

Encashment Threshold Days

10

Earning Component

Leave Encashment

Save

2. Add it in the Leave Policy and assign it to the Employee you want to create this Leave Policy for by going to the Leave Policy Assignment. Leaves will automatically be allocated once the Leave Policy Assignment is 'Submitted'.

HR > Leave Policy Assignment > HR-LPOL-ASSGN-00001

Search or type a command (Ctrl + G) Help VM

### HR-LPOL-ASSGN-00001

Submitted

Assigned To

Attachments

Attach File

Reviews

Shared With

Tags

Add a tag ...

0 0 FOLLOW

You edited this just now

You created this 1 minute ago

#### Connections ^

Leaves

Leave Allocation

Employee \*

HR-EMP-00001: Vrinda A Menon

Employee name

Vrinda A Menon

Company

Popcorn Ltd

Leave Policy \*

HR-LPOL-2021-00001

☐ Add unused leaves from previous allocations

Assignment based on

Joining Date

Effective From \*

06-08-2020

Effective To \*

06-08-2021

Cancel

3. Before creating a Leave Encashment with the Encashable Leave Type that was previously created, make sure that a Salary Structure is assigned to the Employee and that you have added the 'Leave Encashment Amount Per Day (INR)' for the same Salary Structure.





HR > Leave Encashment > HR-ENC-2021-00002

Search or type a command (Ctrl + G)

Help VM

HR-ENC-2021-00002

Submitted

<

>

Print

More

Cancel

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0

0

FOLLOW

You edited this

9 minutes ago

You created this

9 minutes ago

Leave Period \*

HR-LPR-2021-00001

Employee \*

HR-EMP-00001: Vrinda A Menon

Employee Name

Vrinda A Menon

Company \*

Popcorn Ltd

Leave Type \*

Casual Leave

Leave Allocation

HR-LAL-2021-00001

Leave Balance

20

Encashable days

10

Payroll

Encashment Date

05-08-2021

Currency \*

INR

Encashment Amount

₹ 2,000.00

The 'Encashment Amount' will be automatically pulled in when you save the Leave Encashment DocType.

An Additional Salary will be automatically created once the 'Encashment Leave' is Submitted.

vrinda's SS

Submitted

Preview Salary Slip

Assign Salary Structure

Assign to Employees

<

>

Print

More

Cancel

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0

0

FOLLOW

You edited this

5 minutes ago

You created this

5 minutes ago

Connections

^

Salary Structure Assignment

+

Employee Grade

+

Salary Slip

+

Company \*

Popcorn Ltd

Is Active \*

Yes

Payroll Frequency \*

Monthly

Currency \*

INR

Salary Slip Based on Timesheet

Leave Encashment Amount Per Day (INR)

₹ 200.00

6. On creation of the Salary Slip the Leave Encashment amount will be added along with other Earnings into the Salary Slip as shown below.

The screenshot displays the 'Salary Slip' interface for employee Vrinda A Menon. The interface includes a navigation bar at the top with the Dell logo, breadcrumb navigation (Payroll > Salary Slip > Sal Slip/HR-EMP-00001/00001), a search bar, and user information (Help, VM). Below the navigation bar, the employee's name 'Vrinda A Menon' is shown with a 'Submitted' status. The main content area is divided into two sections: 'Earnings' and 'Deductions'. The 'Earnings' table lists three components: Basic (₹ 90,000.00), Special Allowance (₹ 5,000.00), and Leave Encashment (₹ 2,000.00). A red arrow points to the 'Leave Encashment' row. The 'Deductions' table lists two components: Professional Tax (₹ 200.00) and Provident Fund (₹ 18,000.00). At the bottom, the 'Gross Pay (INR)' is ₹ 97,000.00 and the 'Total Deduction (INR)' is ₹ 18,200.00.

Earnings		Deductions	
Component	Amount	Component	Amount
Basic	₹ 90,000.00	Professional Tax	₹ 200.00
Special Allowance	₹ 5,000.00	Provident Fund	₹ 18,000.00
Leave Encashment	₹ 2,000.00		

Gross Pay (INR): ₹ 97,000.00

Total Deduction (INR): ₹ 18,200.00

You can use the 'Preview Salary Slip' button to make sure that the Encashed leaves are also included in the Employee's Salary Slip before submitting the same.

## Leave allocation after Compensatory Leave Request

Use case: If an employee works on a Holiday and wants to apply for a compensatory off, the following process is important in DellSuite:

- 1) Create an Employee with the mandatory details and assign a Holiday List and a Leave Policy to it.
- 2) Attendance should be marked for the Employee, it is mandatory for the employee to be marked as present on the Holiday [this Holiday should be in the Holiday List.]



5) Now, create a Compensatory Leave Request for the employee.

Comments

0

Assigned To

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Reviews

+

Shared With

+

Followed by

M

Unfollow

You edited this

3 minutes ago

You created this

4 minutes ago

Prajakta

Submitted

HR-CMP-20-01-00002

Menu Cancel

Employee

HR-EMP-00007: Prajakta

Leave Type

Privilege Leave

Employee Name

Prajakta

WORKED ON HOLIDAY

Work From Date

12-01-2020

Reason

Test

Work End Date

12-01-2020

Half Day

Add a comment

Comment

Ctrl+Enter to add comment

6) Go back and check the Leave allocation for the leave added for the Employee.

Comments

0

Assigned To

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Reviews

+

Shared With

+

You edited this

2 minutes ago

You created this

4 minutes ago

67.39MB (0%) used

HR-LAL-2020-00001-2

Submitted

Menu Cancel

DASHBOARD

Compensatory Leave Request +

Leave Encashment +

Employee Leave Balance

Employee

HR-EMP-00007: Prajakta

Leave Type

Privilege Leave

Employee Name

Prajakta

From Date

16-01-2020

To Date

31-05-2020

ALLOCATION

New Leaves Allocated

7

Amended From

HR-LAL-2020-00001-1

Add unused leaves from previous allocations

Total Leaves Allocated

7

# Payroll Articles

## How to process Payroll in DellSuite

Most of the users find it difficult to process payroll in DellSuite HR, but rather than it being difficult, it is a bit tedious in the initial setup. Once, the setup is done it, the process for the following months becomes easy. Kindly go through the below steps for a quick guide:

### 1) Create Payroll Period

In this, you define a period for which you want to process the payroll for. It could be January to December or April to March as per the year followed by your company.

### 2) Create Income Tax Slabs

Over here, you can create multiple Income Tax slabs if you are following the Indian Income Tax system. Define the slabs as per the government rule. You can also add additional tax in the section below and conditions in the table if required and also check 'Allow Tax Exemption' in case there is a standard deduction applicable.



## 5) Create a Salary Structure

Once you have created all the salary components, you can define a salary structure. You can also define whether the salary is based on timesheets. You can add the earnings and deductions as per your choice and the mode of payment.

Sal structure 1 • Submitted

5 weeks ago  
11730.41MB (76%) used

EARNING

Earnings

<input type="checkbox"/>	Component	Abbr	Statist...	Formula	Amount	
<input type="checkbox"/>	1 Basic	B			₹ 50,000.00	▼
<input type="checkbox"/>	2 House Rent Allowance	HRA		B * 0.4	₹ 0.00	▼
<input type="checkbox"/>	3 Special Allowances	SA			₹ 20,000.00	▼

DEDUCTION

Deductions

<input type="checkbox"/>	Component	Abbr	Statist...	Formula	Amount	
<input type="checkbox"/>	1 Professional Tax	PT		0 if (gross_pay <= 7500 and gender == 'Male') else	₹ 0.00	▼
<input type="checkbox"/>	2 Income Tax	IT			₹ 0.00	▼

ACCOUNT

Mode of Payment

Payment Account

Bank ABC

ABC bank pvt ltd - Hr

## 6) Assign the Salary Structure

Once the salary structures have been created, you need to assign it to employees. If you miss this step, then you will not be able to proceed further. During assignment, you have to select the Income Tax Slab (if you have multiple slabs), since the percentage deduction of Income Tax will be calculated based on the same. You can also define a base amount if your salary structures are based on formulas.



Shiv

Submitted

HR-SSA-20-06-00003

Menu

Cancel

Comments

0

Assigned To

Assign

Attachments

Attach File

Tags

Add a tag

Reviews

+

Shared With

+

Employee

EMP/0003: Shiv

Employee Name

Shiv

Company

HR

Salary Structure

Training 1

From Date

01-04-2020

Income Tax Slab

Old regime

Base

₹ 50,000.00

Variable

₹ 0.00

## 7) Create a Payroll Entry & Salary Slips

Once all of the above steps are done, you need to create a payroll entry. Once you have selected the payroll date, frequency and added the payment account, you can filter employees on the basis on department, designation and branch. If you do not wish to do so then you can directly click on 'Get employees'. On doing so, a list of all the employees will populate in the Employee Details section. You can then proceed by clicking on "Create Salary Slips" and all the salary slips will be generated in draft.

Payroll 0018

Submitted

Menu

Cancel

Comments

0

Submit Salary Slip

Assigned To

Assign

Attachments

Attach File

Tags

Add a tag

Reviews

Shared With

You edited this

just now

You created this

5 minutes ago

11690.92MB (76%) used

DASHBOARD

Salary Slip 3 3 +

Journal Entry +

SELECT EMPLOYEES

Posting Date

27-06-2020

Company

HR

Payroll Frequency

Monthly

EMPLOYEES

Department

Human Resources - Hr

Number Of Employees

3

Employee Details

	Employee	Employee Name	Department	Designation	
<input type="checkbox"/>	1	EMP/00012: Kenneth	Kenneth	Human Resources - ...	Software Developer
<input type="checkbox"/>	2	EMP/0001: Reema Mehta	Reema Mehta	Human Resources - ...	HR Manager
<input type="checkbox"/>	3	EMP/0003: Shiv	Shiv	Human Resources - ...	

You can verify the draft salary slips and then submit them via the payroll entry. On submitting the salary slips, an accrual journal entry will be created. This means we are booking the salary expenses in the system and not paying them.

Human Resources > Payroll Entry

Search or type a command (Ctrl + G)

Settings

Help

Payroll 0018

Submitted

Menu

Cancel

Submit Salary Slip

Comments

0

Assigned To

Assign

Attachments

Attach File

Tags

DASHBOARD

Salary Slip 3 3 +

Journal Entry +

Confirm

No

Yes

This will submit Salary Slips and create accrual Journal Entry. Do you want to proceed?

## 8) Bank Entry

Once you have booked the accrued salary slips, as a last step you need to make a Bank Entry. With this last step, your payroll process is completed, but this does not mean the salaries are transferred in the bank. That minor step has to be done manually.

The screenshot shows the 'Payroll Entry' interface for 'Payroll 0018' which is 'Submitted'. The interface includes a top navigation bar with 'Human Resources' and 'Payroll Entry' tabs, a search bar, and 'Settings' and 'Help' menus. On the left, there are sections for 'Comments' (0), 'Assigned To' (Assign +), 'Attachments' (Attach File +), 'Tags' (Add a tag ...), 'Reviews' (+), and 'Shared With' (+). The main content area has a 'DASHBOARD' section with 'Salary Slip' (3 items, 3 in red) and 'Journal Entry' (+). Below this is a 'SELECT EMPLOYEES' section with input fields for 'Posting Date' (27-06-2020), 'Company' (HR), and 'Payroll Frequency' (Monthly). A red box highlights the 'Make Bank Entry' button in the top right corner of the main content area.

## Salary Structure and Payroll

Use case 1: What if one Salary structure has to be assigned to all the Employees ?

If a single Salary structure has to be assigned, it is preferable to create a structure for all the Employees, irrespective of their Salaries, but we can set formula based on which actual salary structures can be allocated to each employee in an organisation.

Go to Salary Structure --> select the Earning or deduction component --> Add formula

New Salary Structure 2 Not Saved Save

Editing Row #1 Insert Below Insert Above Duplicate Move ▲

Component  
House Rent Allowance

Abbr  
HRA

☒ 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.

☒ Is Tax Applicable

☐ Is Flexible Benefit

☐ Variable Based On Taxable Salary

☐ Depends on Payment Days

Condition

1	BS * .1
---	---------

**Condition and Formula Help**

Notes:

1. Use field **base** for using base salary of the Employee
2. Use Salary Component abbreviations in conditions and formulas. **BS = Basic Salary**
3. Use field name for employee details in conditions and formulas. **Employment Type = employment\_type Branch = branch**
4. Use field name from Salary Slip in conditions and formulas. **Payment Days = payment\_days Leave without pay = leave\_without\_pay**

This way, salary will be calculated individually for each employee depending on their monthly income.

Use case 2: What if while generating a payroll, all the employees are not supposed to be fetched, payroll has to be created for selected employees?

Generally, while a payroll is being processed, there is an option --> Get Employees, once it is clicked, all the employees are fetched.

In case, there is only a selected list of employees payroll to be generated, it is preferable to select the employees by filtering on the basis of department, branch, or designation, this way only the selected list of employees belonging to the particular filter will be selected for payroll.

New Payroll Entry 1 ● Not Saved Save

SELECT EMPLOYEES

Posting Date  
25-02-2020

Company  
HR

Payroll Frequency  
Monthly

EMPLOYEES

Branch  
Designation

Department

☐ Validate Attendance

## Income Tax Calculation in DellSuite

- In payroll period, define the income tax slabs as per the government rule. If there are any standard deductions provided by the government, that amount can also be added here.
- If an employee has any kind of investments or tax declarations such as PPF, insurance, mutual funds, HRA, etc., add these in "Employee Tax Exemption Declaration". Screenshot attached:

HR-TAX-DEC-2019-00002

Draft

Menu

Submit

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag ...

SHARED WITH

+

You edited this a few seconds ago

You created this 2 months ago

41.85MB (0%) used

EMP/00006

Test

Employee Name

Heena

Company

HR

	Exemption Sub Category	Exemption Category	Maximum Exempt...	Declared Amount	
<input type="checkbox"/>	1 PPF	80C	₹ 1,50,000.00	₹ 1,00,000.00	▼
<input type="checkbox"/>	2 Mediclaim	80D	₹ 50,000.00	₹ 30,000.00	▼
<input type="checkbox"/>	3 LIC	80C	₹ 1,50,000.00	₹ 30,000.00	▼

Add Row

HRA EXEMPTION

Monthly House Rent

15,000.00

Annual HRA Exemption

₹ 1,20,000.00

☒ Rented in Metro City

Monthly HRA Exemption

₹ 10,000.00

HRA as per Salary Structure

₹ 10,000.00

Total Declared Amount

₹ 1,60,000.00

Total Exemption Amount

₹ 2,80,000.00

- While creating salary component of Income Tax, check the box "Variable Based On Taxable Salary". Ticking this checkbox means, income tax will be calculated automatically taking the payroll period and tax declarations into consideration.
- Create a salary structure and add Income Tax in the deduction section leaving the amount section blank. Along with that kindly add Education cess which will be based on a formula. Screenshot attached:

EARNING

<input type="checkbox"/>	Component	Abbr	Statist...	Formula	Amount	
<input type="checkbox"/>	1 Basic	B	<input type="checkbox"/>		₹ 30,000.00	▼
<input type="checkbox"/>	2 House Rent Allowance	HRA	<input type="checkbox"/>		₹ 15,000.00	▼
<input type="checkbox"/>	3 General Allowances	GA	<input type="checkbox"/>		₹ 30,000.00	▼

DEDUCTION

<input type="checkbox"/>	Component	Abbr	Statist...	Formula	Amount	
<input type="checkbox"/>	1 Professional Tax	PT	<input type="checkbox"/>		₹ 200.00	▼
<input type="checkbox"/>	2 Income Tax	IT	<input type="checkbox"/>		₹ 0.00	▼
<input type="checkbox"/>	3 Education Cess	EC	<input type="checkbox"/>	0.04*IT	₹ 0.00	▼

- Create a payroll entry and generate salary slips. Income tax will be calculated automatically along with the education cess. Screenshot attached:

Sal Slip/EMP/00006/00001

Menu

Submit

EARNING & DEDUCTION

Earning

<input type="checkbox"/>	Component	Amount	
<input type="checkbox"/>	Basic	₹ 30,000.00	▼
<input type="checkbox"/>	House Rent Allowance	₹ 15,000.00	▼
<input type="checkbox"/>	General Allowances	₹ 30,000.00	▼

Add Row

Deduction

<input type="checkbox"/>	Component	Amount	
<input type="checkbox"/>	Professional Tax	₹ 200.00	▼
<input type="checkbox"/>	Income Tax	₹ 7,708.31	▼
<input type="checkbox"/>	Education Cess	₹ 308.33	▼

Add Row

Gross Pay

₹ 75,000.00

Total Deduction

₹ 8,216.00

## Create Payroll Entry with Timesheets

Use Case: An employee's overtime is recorded using timesheets, and the employee needs to be compensated for the same during payroll apart from his usual salary.

Steps:

- 1) Create an Employee.
- 2) Create a Salary Component called "Overtime" of type Earning.

Human Resources > Salary Component

Search or type a command (Ctrl + G)

Settings Help

Overtime Enabled

Menu Save

Comments1

Assigned ToAssign +

AttachmentsAttach File +

TagsAdd a tag ...

Reviews+

Shared With+

You edited this 4 months ago

You created this 4 months ago

AbbrOT

TypeEarning

Description

Is Payable

Depends on Payment Days

Is Tax Applicable

Deduct Full Tax on Selected Payroll Date

Round to the Nearest Integer

Statistical Component

Do Not Include in Total

Disabled

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

Accounts

	Company	Default Account	
<input type="checkbox"/>	1 Unico Plastics Inc.	Salary - UP	

Add Row

- 3) Create a Salary Structure and include "Overtime" with amount set to 0.
- 4) In the Salary Structure itself, select the "Salary Slip Based on Timesheet" checkbox, select Salary Component as "Overtime" and enter the Hour Rate.



Human Resources > Salary Structure

Search or type a command (Ctrl + G)

Settings Help

Test 2019-20-1 Submitted

Menu Cancel

✓ Salary Slip Based on Timesheet

Salary Component

**Overtime**

Salary Component for timesheet based payroll.

Hour Rate

**₹ 500.00**

Leave Encashment Amount Per Day

**₹ 0.00**

Max Benefits (Amount)

**₹ 0.00**

EARNING

Earnings

<input type="checkbox"/>	Component	Abbr	Statist...	Formula	Amount	
<input type="checkbox"/>	1 Basic	B			₹ 10,000.00	
<input type="checkbox"/>	2 House Rent Allowance	HRA			₹ 3,000.00	
<input type="checkbox"/>	3 Dearness Allowance	DA			₹ 3,000.00	
<input type="checkbox"/>	4 Medical	Med			₹ 2,000.00	
<input type="checkbox"/>	5 Overtime	OT			₹ 0.00	

5) Submit the Salary Structure and assign this Salary Structure to an Employee via Salary Structure Assignment.

Human Resources > Salary Structure Ass...

Search or type a command (Ctrl + G)

Settings Help

Jennifer Smith Submitted

HR-SSA-20-01-00004

Menu Cancel

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

Employee

**HR-EMP-00026: Jennifer Smith**

Employee Name

**Jennifer Smith**

Department

**Advertisement - UP**

Salary Structure

**Test 2019-20-1**

From Date

**01-01-2020**

Company

**Unico Plastics Inc.**

Base

**₹ 50,000.00**

Variable

**₹ 0.00**

6) Create Timesheets for this Employee through the Timesheet DocType.

## Jennifer's January Timesheet 1 Payslip

TS-2020-00002

Menu

Cancel

Comments

0

Assigned To

Assign

+

Attachments

Attach File

+

Tags

Add a tag ...

Reviews

+

Shared With

+



You edited this

22 minutes ago

You created this

29 minutes ago

Title

Jennifer's January Timesheet 1

Company

Unico Plastics Inc.

Salary Slip

Sal Slip/HR-EMP-00026/00001

Status

Payslip

EMPLOYEE DETAIL

Employee

HR-EMP-00026: Jennifer Smith

Start Date

18-01-2020

Employee Name

Jennifer Smith

Starting Time

12:38:58

Department

Advertisement - UP

End Date

18-01-2020

Time Sheets

<input type="checkbox"/>	Activity Type	From Time	Hrs	Project	Task	
<input type="checkbox"/>	1 Research	18-01-2020 08:39:21	2			▼
<input type="checkbox"/>	2 Proposal Writing	18-01-2020 16:39:40	4			▼

Total Working Hours

6

## Jennifer's January Timesheet 2 Payslip

TS-2020-00003

Menu

Cancel

Comments

0

Assigned To

Assign

+

Attachments

Attach File

+

Tags

Add a tag ...

Reviews

+

Shared With

+



You edited this

22 minutes ago

You created this

24 minutes ago

Title

Jennifer's January Timesheet 2

Company

Unico Plastics Inc.

Salary Slip

Sal Slip/HR-EMP-00026/00001

Status

Payslip

EMPLOYEE DETAIL

Employee

HR-EMP-00026: Jennifer Smith

Start Date

24-01-2020

Employee Name

Jennifer Smith

Starting Time

12:44:43

Department

Advertisement - UP

End Date

24-01-2020

Time Sheets

<input type="checkbox"/>	Activity Type	From Time	Hrs	Project	Task	
<input type="checkbox"/>	1 Client Query Handling	24-01-2020 12:45:02	2			▼

Total Working Hours

2

In the above example shown, the Employee has worked overtime for a total of 8 hours in the month of January.

7) Create a new Payroll Entry for the month of January and select the "Salary Slip Based on Timesheet" checkbox. Save. Click on the "Get Employees" button. Next, click on "Create Salary Slips".

The Salary Slip of the employee will fetch all the timesheets (if any) of that employee created for that particular month and calculate the Overtime Component in the Salary Slip accordingly.

Human Resources > Salary Slip

Search or type a command (Ctrl + G)

Settings Help

Jennifer Smith Submitted

Sal Slip/HR-EMP-00026/00001 Menu Cancel

You edited this 29 minutes ago

You created this 29 minutes ago

✓ Salary Slip Based on Timesheet

Start Date01-01-2020

End Date31-01-2020

Salary Structure

Test 2019-20-1

Working Days23

Leave Without Pay0

Payment Days23

Salary Slip Timesheet

<input type="checkbox"/>	Time Sheet	Working Ho...	
<input type="checkbox"/>	TS-2020-00002	6	▼
<input type="checkbox"/>	TS-2020-00003	2	▼


Total Working Hours8

Hour Rate₹ 500.00





☐ Deduct Tax For Unclaimed Employee Benefits




☐ Deduct Tax For Unsubmitted Tax Exemption Proof

EARNING & DEDUCTION


Human Resources > Salary Slip

Search or type a command (Ctrl + G)

 Settings
 Help



Jennifer Smith • Submitted
Sal Slip/HR-EMP-00026/00001



Menu
Cancel

Earnings				Deductions			
<input type="checkbox"/>	Component	Amount		<input type="checkbox"/>	Component	Amount	
<input type="checkbox"/>	Overtime	₹ 4,000.00	▼	<input type="checkbox"/>	Provident Fund	₹ 1,200.00	▼
<input type="checkbox"/>	Basic	₹ 10,000.00	▼				
<input type="checkbox"/>	House Rent Allowance	₹ 3,000.00	▼				
<input type="checkbox"/>	Dearness Allowance	₹ 3,000.00	▼				
<input type="checkbox"/>	Medical	₹ 2,000.00	▼				

Gross Pay	₹ 22,000.00	Total Deduction	₹ 1,200.00
Total Principal Amount	₹ 0.00	Total Loan Repayment	₹ 0.00
Total Interest Amount	₹ 0.00		

NET PAY INFO	
Net Pay	₹ 20,800.00
Rounded Total	₹ 20,800.00

Gross Pay - Total Deduction - Loan Repayment

## Working Days Calculation in the Salary Slip

Working Days are shown in the Salary Slip. Based on your preference, it may include holidays of the month, or it may not. You can define your preference for the Working Days calculation in HR Settings.

HR > Setup > HR Settings

If you want to include holidays in the count of Total Working days, then ensure that in the HR Settings, field Include holidays in Total no. of Working Days is checked and vice versa.

The screenshot shows the 'Payroll Settings' page. On the left, there are sections for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews', and 'Shared With'. The main content area is divided into two columns. The left column is titled 'Calculate Payroll Working Days Based On' and contains a dropdown menu set to 'Leave', a 'Max working hours against Timesheet' field set to '8.000', and a checkbox 'Include holidays in Total no. of Working Days' which is checked and highlighted with a red box. Below this checkbox is a note: 'If checked, Total no. of Working Days will include holidays, and this will reduce the value of Salary Per Day'. There is also an unchecked checkbox 'Disable Rounded Total' with a note: 'If checked, hides and disables Rounded Total field in Salary Slips'. The right column is titled 'Fraction of Daily Salary for Half Day' and contains a field set to '0.500'. Below this is a checkbox 'Email Salary Slip to Employee' which is checked and highlighted with a red box. Below this checkbox is a note: 'Emails salary slip to employee based on preferred email selected in Employee'. There are also unchecked checkboxes for 'Encrypt Salary Slips in Emails' and 'Show Leave Balances in Salary Slip'. A 'Save' button is located at the top right of the settings area.

To learn how to define holidays for your company, check [Holiday List](#) feature in the HR module.

## Setting Flexible Benefits against a Benefit Claim

Flexible benefit plans allow employees to avail the benefits they want or need from a package of programs offered by an employer. They may include health insurance, pension plans, telephone expenses, etc.

To set Flexible Benefits in DellSuite HR, follow the following steps:

- 1) Go to Salary Component for which you want to set flexible benefits for and select the "Is Flexible Benefit" checkbox. Enter the Yearly Max. Benefit Amount. Select the "Pay Against Benefit Claim" checkbox to avail the flexible benefits via a Benefit Claim.

Human Resources > Salary Component

Search or type a command (Ctrl + G)

Settings Help

## Telephone Expenses • Enabled

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

You edited this 21 hours ago

You created this 21 hours ago

39.27MB (0%) used

Abbr **T**

Type **Earning**

Description

☒ Is Payable

☐ Depends on Payment Days

☒ Is Tax Applicable

☐ Deduct Full Tax on Selected Payroll Date

☐ Round to the Nearest Integer

☐ Statistical Component

If selected, the value specified or calculated in this component will not contribute to the earnings or deductions. However, it's value can be referenced by other components that can be added or deducted.

☐ Do Not Include in Total

☐ Disabled

FLEXIBLE BENEFITS

☒ Is Flexible Benefit

Max Benefit Amount (Yearly) **5,000.00**

☒ Pay Against Benefit Claim

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

☐ Create Separate Payment Entry Against Benefit Claim

2) Set up a Salary Structure for the Employee with this Salary Component. Set the Amount to 0. Also, enter the Max Benefits Amount for this Salary Structure.

Human Resources > Salary Structure

Search or type a command (Ctrl + G)

Settings Help

## 2019-20 • Submitted

Salary Slip Based on Timesheet

Leave Encashment Amount Per Day **₹ 0.00**

Max Benefits (Amount) **₹ 5,000.00**

EARNING

Earnings

	Component	Abbr	Statist...	Formula	Amount	
<input type="checkbox"/> 1	Basic	B			₹ 50,000.00	
<input type="checkbox"/> 2	House Rent Allowance	HRA			₹ 24,000.00	
<input type="checkbox"/> 3	Arrear	A			₹ 10,000.00	
<input type="checkbox"/> 4	Telephone Expenses	T			₹ 0.00	

3)

Assign the Salary Structure to the employee via Salary Structure Assignment.

4) Create an Employee Benefit Claim for this employee. Select the Claim Date, Component and enter the Claimed Amount.

Human Resources > Employee Benefit Cl... Search or type a command (Ctrl + G) Settings Help

Michelle Submitted HR-BEN-CLM-20-02-00003 Menu Cancel

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

You edited this in a few seconds

You created this a few seconds ago

Employee

HR-EMP-00001: Michelle

Employee Name

Michelle

Department

Accounts - TB

BENEFIT TYPE AND AMOUNT

Claim Benefit For

Telephone Expenses

Max Amount Eligible

₹ 5,000.00

Claimed Amount

₹ 5,000.00

Claim Date

02-04-2020

5) Run the Payroll Entry. The amount will be fetched against the component in the Salary Slip as seen below.



Michelle • Draft

Sal Slip/HR-EMP-00001/00002



Menu

Submit

30

- ☐ Deduct Tax For Unclaimed Employee Benefits
- ☐ Deduct Tax For Unsubmitted Tax Exemption Proof

EARNING & DEDUCTION

Earning

Earnings

<input type="checkbox"/>	Component	Amount	
<input type="checkbox"/>	Basic	₹ 50,000.00	▼
<input type="checkbox"/>	House Rent Allowance	₹ 24,000.00	▼
<input type="checkbox"/>	Arrear	₹ 10,000.00	▼
<input type="checkbox"/>	Telephone Expenses	₹ 5,000.00	▼
Add Row			

Deduction

Deductions

<input type="checkbox"/>	Component	Amount	
No Data			
Add Row			

Gross Pay

₹ 89,000.00

Total Deduction

₹ 0.00