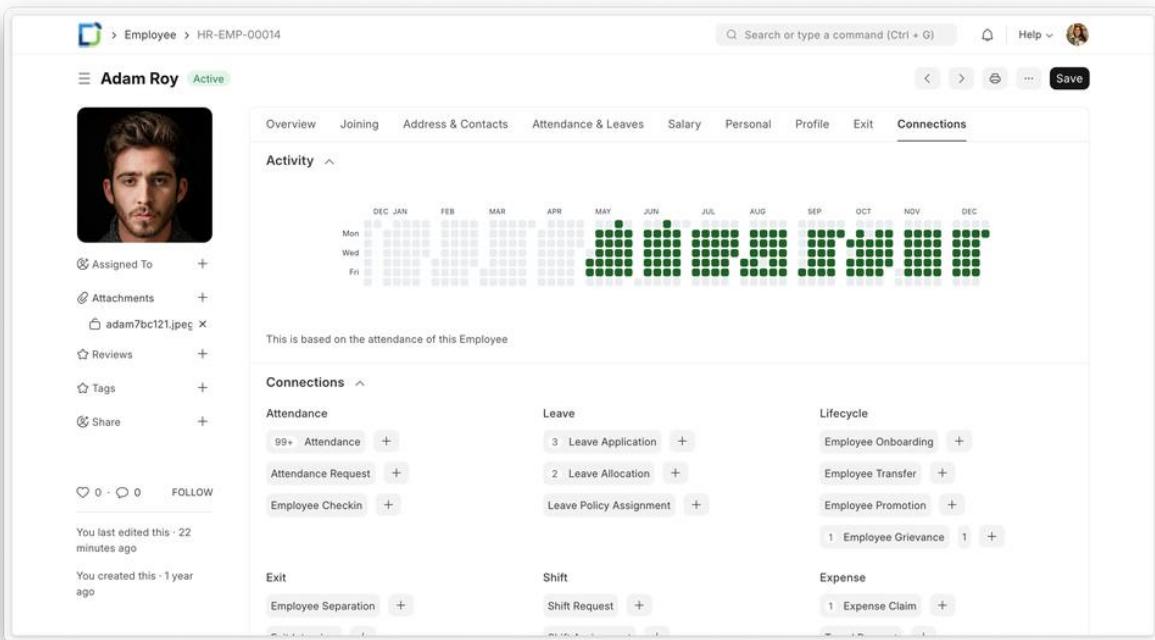


# DellSuite HR

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!

A screenshot of the DellSuite HR software interface. The top navigation bar shows 'Employee > HR-EMP-00014'. The main header 'Adam Roy' is marked as 'Active'. The top navigation bar includes a search bar, a help icon, and a user profile icon. Below the header, there are tabs for 'Overview', 'Joining', 'Address & Contacts', 'Attendance & Leaves', 'Salary', 'Personal', 'Profile', 'Exit', and 'Connections'. The 'Connections' tab is currently selected. The 'Activity' section shows a grid of green squares representing attendance data for the year. A note below the grid states: 'This is based on the attendance of this Employee'. The 'Connections' section is expanded, showing categories like 'Attendance', 'Leave', 'Lifecycle', 'Exit', 'Shift', and 'Expense', each with sub-options and counts. On the left side, there is a sidebar with links for 'Assigned To', 'Attachments' (with a file named 'adam7bc121.jpeg'), 'Reviews', 'Tags', 'Share', and social sharing buttons ('0 - FOLLOW'). A note at the bottom of the sidebar says 'You last edited this - 22 minutes ago' and 'You created this - 1 year ago'.

## 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.

### 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 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

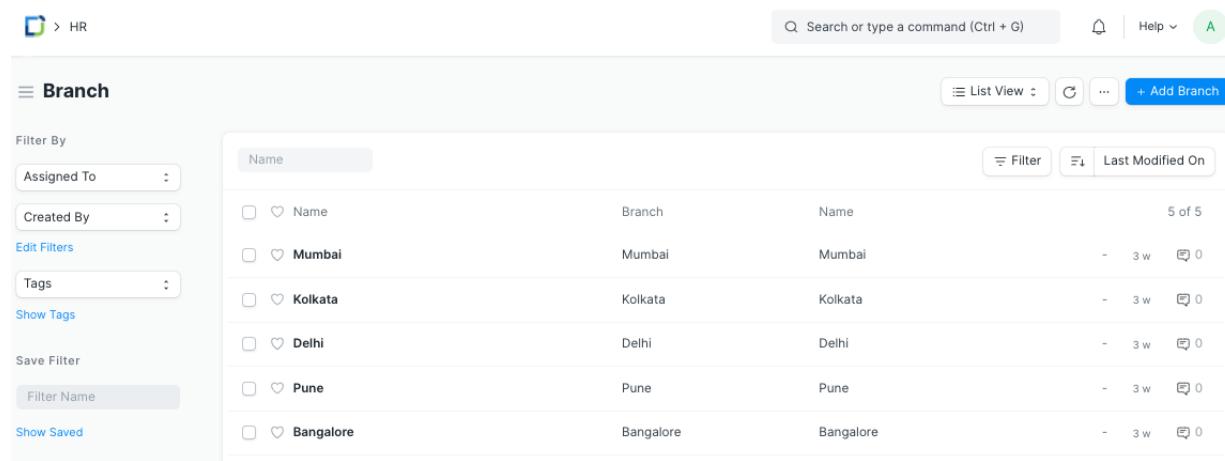
## 1. Prerequisites

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.



Name	Branch	Name	Last Modified On
<input type="checkbox"/> Mumbai	Mumbai	Mumbai	- 3 w 0
<input type="checkbox"/> Kolkata	Kolkata	Kolkata	- 3 w 0
<input type="checkbox"/> Delhi	Delhi	Delhi	- 3 w 0
<input type="checkbox"/> Pune	Pune	Pune	- 3 w 0
<input type="checkbox"/> Bangalore	Bangalore	Bangalore	- 3 w 0

You can link the Branch to the [Employee](#) master.

## Department

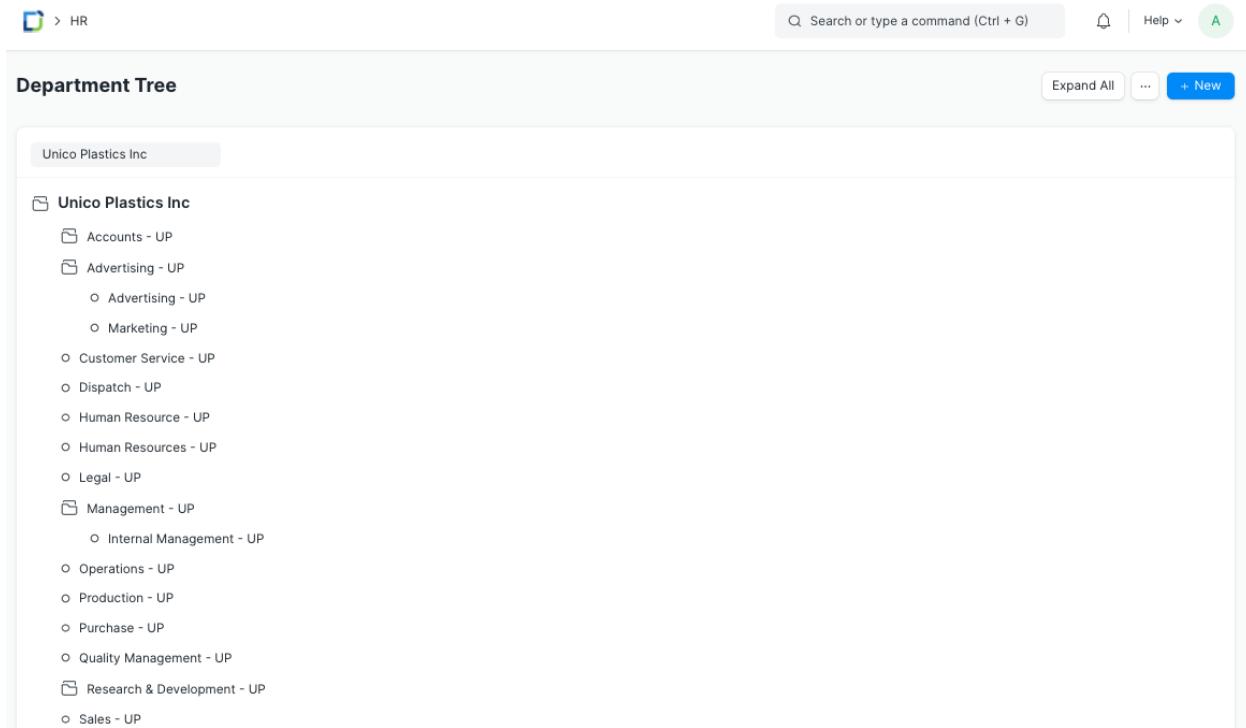
A Department is a specialized functional area or a division within an organization.

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:



The screenshot shows a software interface with a header bar containing a search bar, a help button, and a user profile icon. Below the header is a title bar labeled 'Department Tree'. The main content area displays a hierarchical tree structure for 'Unico Plastics Inc'. The root node is 'Unico Plastics Inc', which has several child nodes: 'Accounts - UP', 'Advertising - UP', 'Customer Service - UP', 'Dispatch - UP', 'Human Resource - UP', 'Human Resources - UP', 'Legal - UP', 'Management - UP', 'Operations - UP', 'Production - UP', 'Purchase - UP', 'Quality Management - UP', 'Research & Development - UP', and 'Sales - UP'. Each node is represented by a small icon followed by its name and a status indicator.

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:

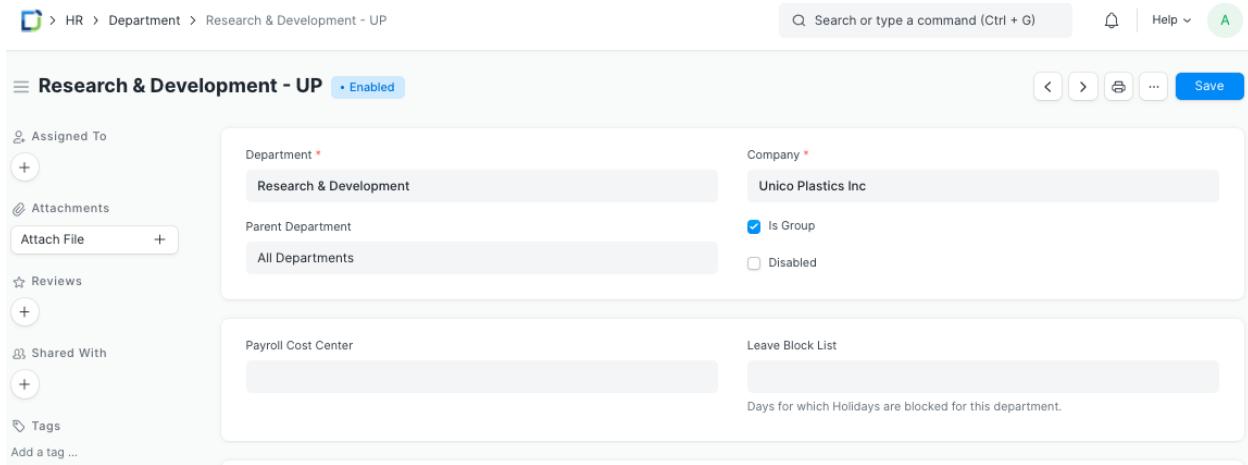
- Company

## 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.



Assigned To

Attachments

Reviews

Shared With

Tags

Department \* Research & Development

Parent Department All Departments

Company \* Unico Plastics Inc

Is Group

Disabled

Payroll Cost Center

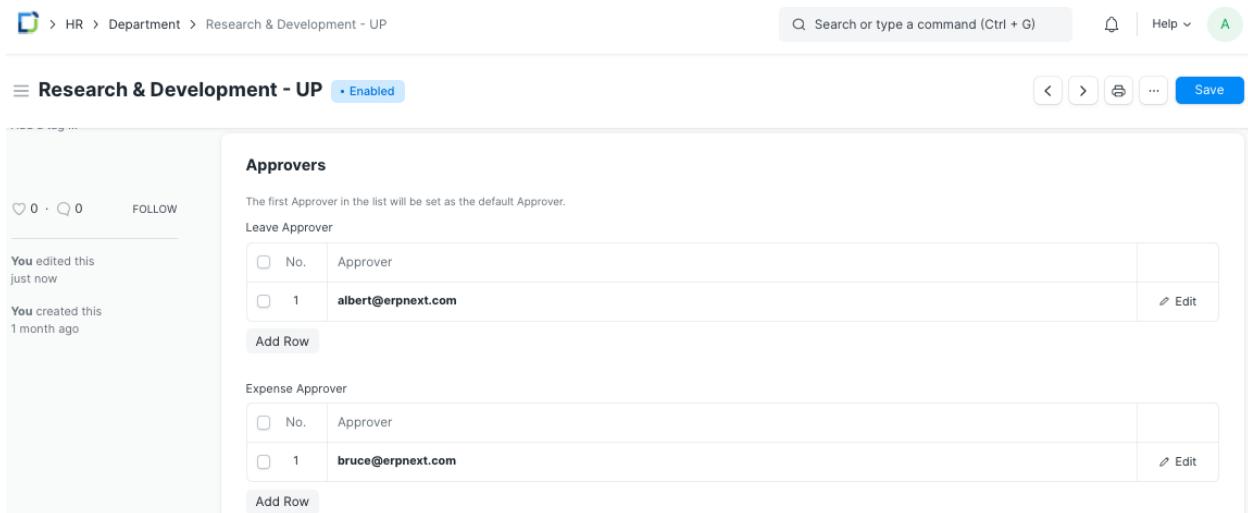
Leave Block List

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.



Approvers

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

Leave Approver

No.	Approver	Edit
1	albert@erpnext.com	<input type="button" value="Edit"/>

Add Row

Expense Approver

No.	Approver	Edit
1	bruce@erpnext.com	<input type="button" value="Edit"/>

Add Row

Heart 0 · Comment 0 FOLLOW

You edited this just now

You created this 1 month ago

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.

The screenshot shows the ERPNext software interface for managing employee designations. The top navigation bar includes a logo, the path 'HR > Designation > Software Developer', a search bar, and a help icon. The main content area is titled 'Software Developer' and contains the following sections:

- Assigned To:** A list with an add button.
- Attachments:** A list with an add button.
- Reviews:** A list with an add button.
- Shared With:** A list with an add button.
- Tags:** A section to 'Add a tag ...'.

**Description:** A text area stating: "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:** A table listing the required skills:

Skills		
No.	Skill	Edit
1	Logical	<input type="button" value="Edit"/>
2	Analytical	<input type="button" value="Edit"/>
3	Computer programming and coding	<input type="button" value="Edit"/>
4	Software testing and debugging	<input type="button" value="Edit"/>
5	Creativity	<input type="button" value="Edit"/>

**Activity:** Shows 0 likes and 0 comments. A 'FOLLOW' button is present.

**History:** Shows 'You edited this 2 days ago' and 'You created this 1 month ago'.

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.

L6

Assigned To

Attachments

Reviews

Shared With

Connections

- Employee
- Leave Period
- Employee Onboarding Template
- Employee Separation Template

Default Salary Structure

Salary Structure 2021-22

Shown below are the different Employee Grades created.

Employee Grade

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

Filter Name

Show Saved

Name	Last Modified On
<input type="checkbox"/> <span>Heart</span> L4	6 of 6
<input type="checkbox"/> <span>Heart</span> L2	- 2 d 0
<input type="checkbox"/> <span>Heart</span> L3	- 2 d 0
<input type="checkbox"/> <span>Heart</span> L1	- 2 d 0
<input type="checkbox"/> <span>Heart</span> L6	- 2 d 0
<input type="checkbox"/> <span>Heart</span> L5	- 3 w 0

20 100 500

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 shows the 'Consultants' list screen for an Employee Group. The table contains the following data:

No.	Employee	Employee Name	Action
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.

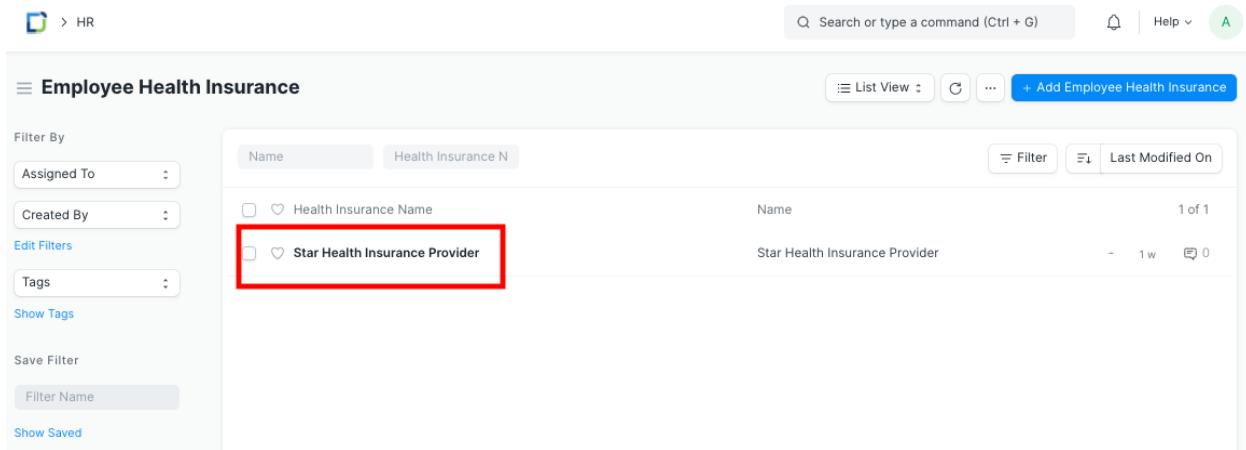
DellSuite HR allows you to save the Employee Health Insurance detail and link it to that particular Employee's master.

To access Health Insurance Provider document, go to:

Home > Human Resources > Employee > Employee Health Insurance

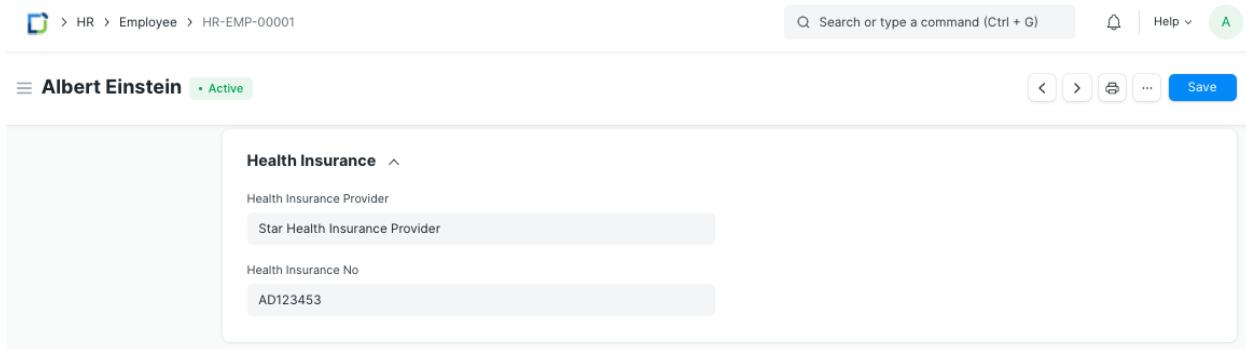
#### **1. How to create an Employee Health Insurance**

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



The screenshot shows the 'Employee Health Insurance' list view. On the left, there is a sidebar with 'Filter By' sections for 'Assigned To', 'Created By', 'Edit Filters', and 'Tags', along with 'Show Tags', 'Save Filter', 'Filter Name', and 'Show Saved' buttons. The main area has a search bar 'Search or type a command (Ctrl + G)' and a toolbar with 'List View', 'C', '...', '+ Add Employee Health Insurance', 'Filter', and 'Last Modified On'. The list table has columns for 'Name' and 'Health Insurance N'. A row for 'Star Health Insurance Provider' is selected and highlighted with a red box. The table shows 1 of 1 result.

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



The screenshot shows the 'Employee' master record for 'Albert Einstein'. The breadcrumb navigation is 'HR > Employee > HR-EMP-00001'. The top bar includes a search bar 'Search or type a command (Ctrl + G)', a lock icon, 'Help', and a user icon. The record details are shown in a card: 'Albert Einstein' (Active), with buttons for back, forward, copy, and save. Below the card, a 'Health Insurance' section is expanded, showing 'Health Insurance Provider' set to 'Star Health Insurance Provider' and 'Health Insurance No' set to 'AD123453'.

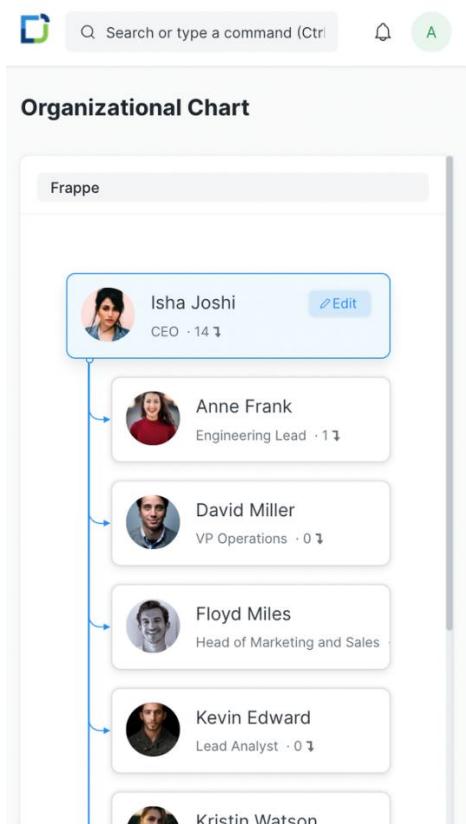
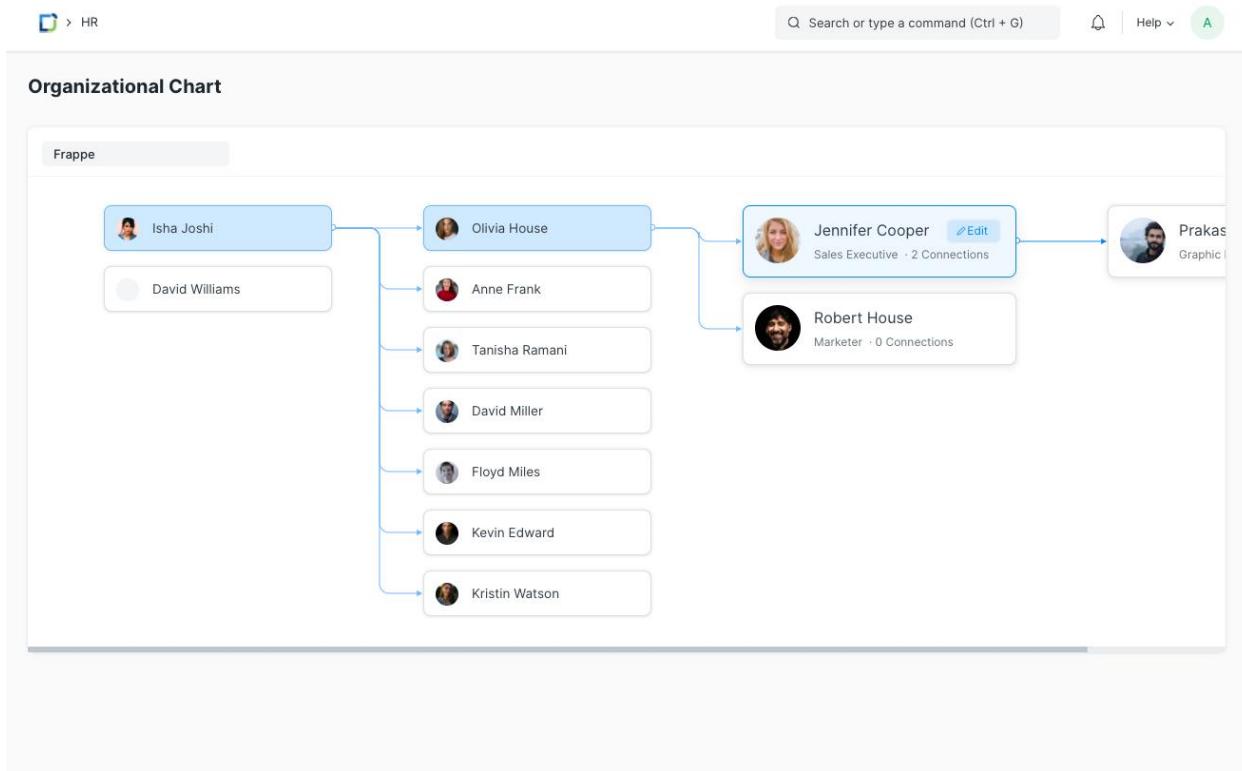
# Organizational Chart

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.



# 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.

Shared With: HR-EMP-00001

Employee: HR-EMP-00001

Attendance Date: 19-05-2021

Employee Name: Albert Einstein

Company: Unico Plastics Inc

Status: Present

Department: Research & Development - UP

Details:

- Shift
- 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

Employee Attendance Tool • Not Saved

Search or type a command (Ctrl + G)

Help

Date: 02-03-2023

Filters

Select Employees

Unmarked Attendance

Select All Unselect All

HR-EMP-00017 : Mike Ross  HR-EMP-00010 : Prachi S  HR-EMP-00015 : Praveen Saini  HR-EMP-00011 : Ram  HR-EMP-00012 : test  HR-EMP-00013 : Test WH

Set Attendance Details

Status:  Shift:

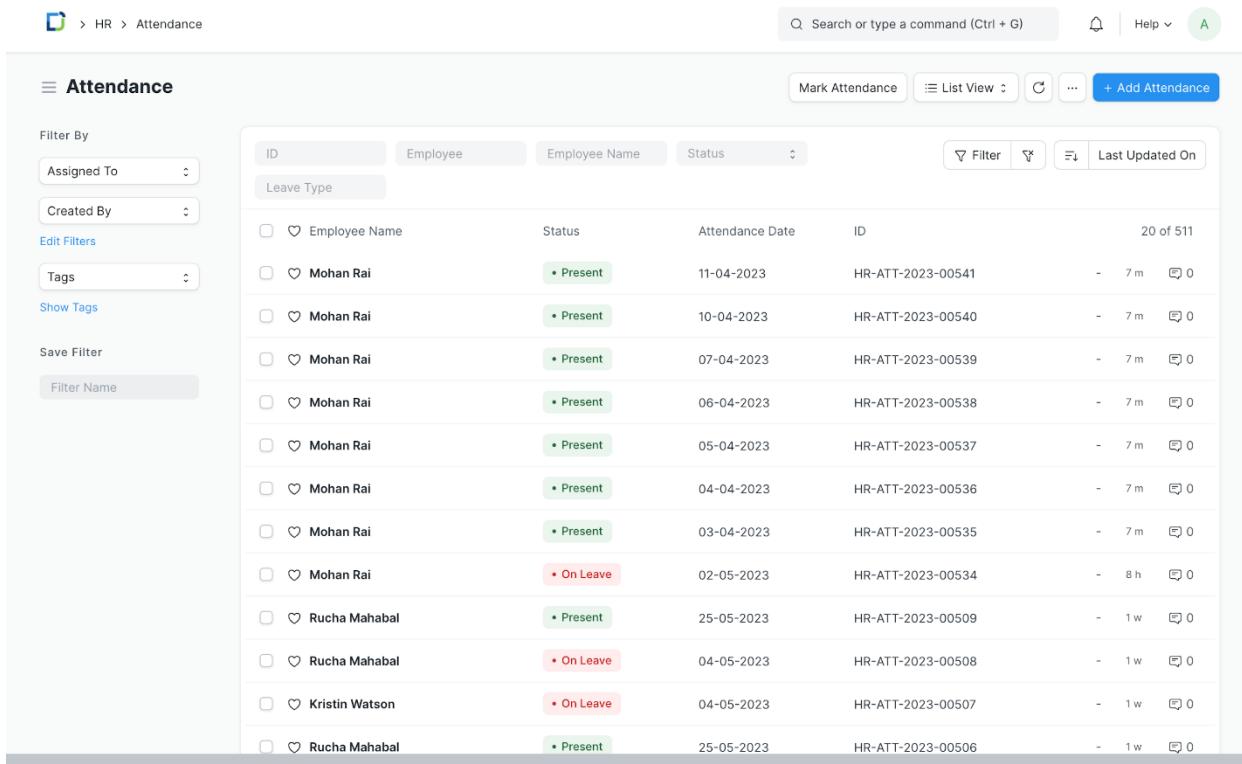
Late Entry  Early Exit

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:



Attendance

Mark Attendance List View ... + Add Attendance

Filter By

Assigned To: Employee Name

Created By: Employee Name

Leave Type: Employee Name

Employee Name Status Attendance Date ID

20 of 511

Employee Name Status Attendance Date ID

Mohan Rai Present 11-04-2023 HR-ATT-2023-00541 - 7 m 0

Mohan Rai Present 10-04-2023 HR-ATT-2023-00540 - 7 m 0

Mohan Rai Present 07-04-2023 HR-ATT-2023-00539 - 7 m 0

Mohan Rai Present 06-04-2023 HR-ATT-2023-00538 - 7 m 0

Mohan Rai Present 05-04-2023 HR-ATT-2023-00537 - 7 m 0

Mohan Rai Present 04-04-2023 HR-ATT-2023-00536 - 7 m 0

Mohan Rai Present 03-04-2023 HR-ATT-2023-00535 - 7 m 0

Mohan Rai On Leave 02-05-2023 HR-ATT-2023-00534 - 8 h 0

Rucha Mahabal Present 25-05-2023 HR-ATT-2023-00509 - 1 w 0

Rucha Mahabal On Leave 04-05-2023 HR-ATT-2023-00508 - 1 w 0

Kristin Watson On Leave 04-05-2023 HR-ATT-2023-00507 - 1 w 0

Rucha Mahabal Present 25-05-2023 HR-ATT-2023-00506 - 1 w 0

### 3. Related Topics

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.

**New Attendance Request** • Not Saved

Employee \*

Company \*

Employee Name

From Date \*

Department

To Date \*

Half Day

Half Day Date \*

**Reason**

Reason \*

Explanation

**Save**

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.

**Attendance**

Mark Attendance

Name Employee Employee Name Status Leave Type Last Modified On

1 filter

3 of 3

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

Filter By

Assigned To

Created By

Edit Filters

Tags

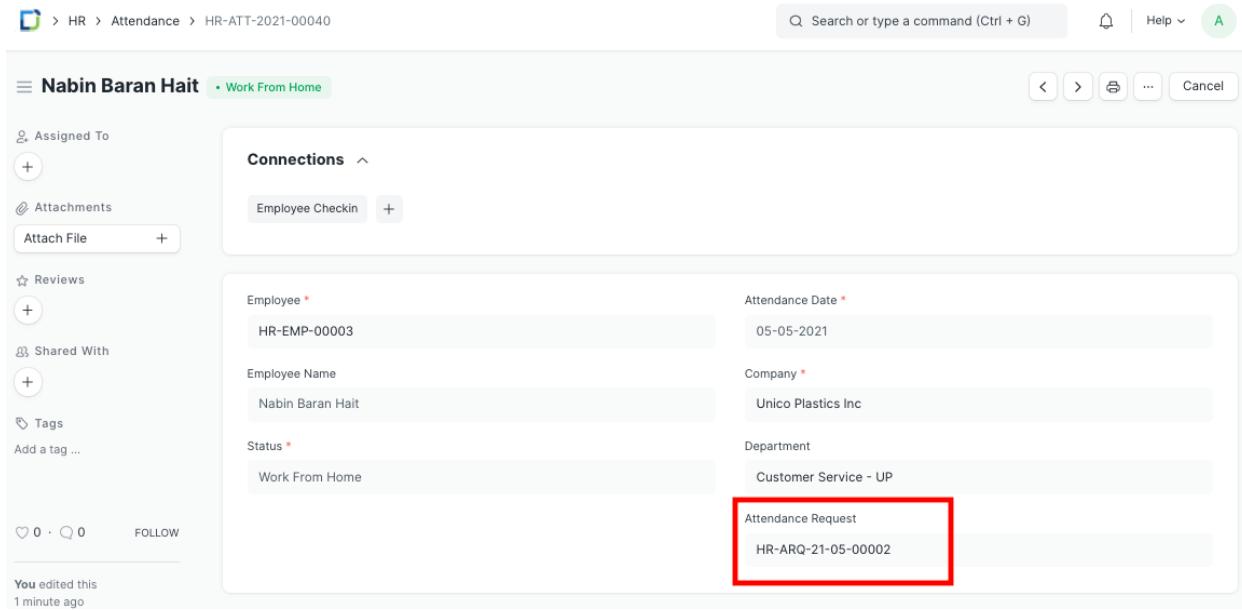
Show Tags

Save Filter

Filter Name

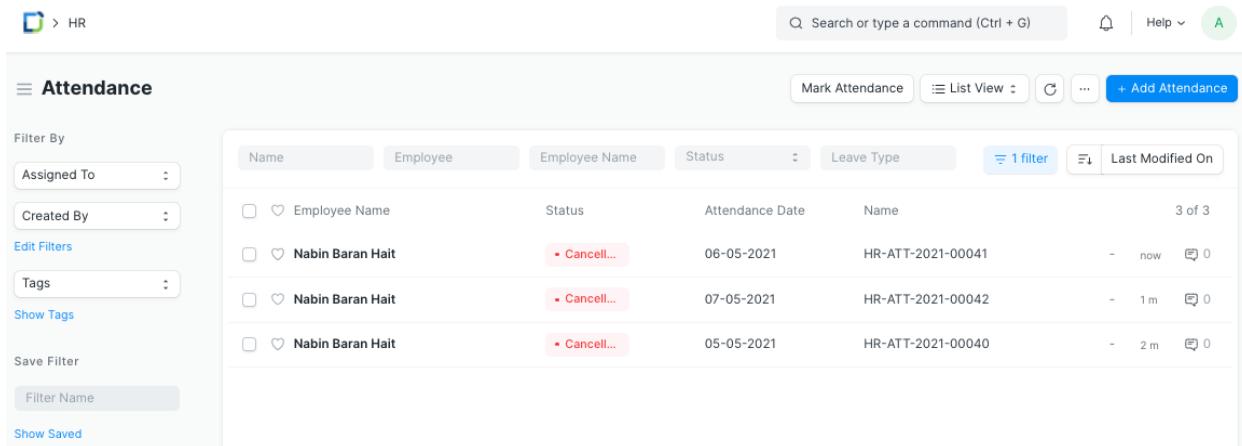
Show Saved

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



The screenshot shows the detail view of an Attendance Request for employee Nabin Baran Hait. The request is titled 'Work From Home'. The main form fields include Employee (HR-EMP-00003), Attendance Date (05-05-2021), Company (Unico Plastics Inc), and Department (Customer Service - UP). A red box highlights the 'Attendance Request' section, which shows the ID HR-ARQ-21-05-00002. The sidebar on the left shows various links like Assigned To, Attachments, Reviews, Shared With, and Tags.

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



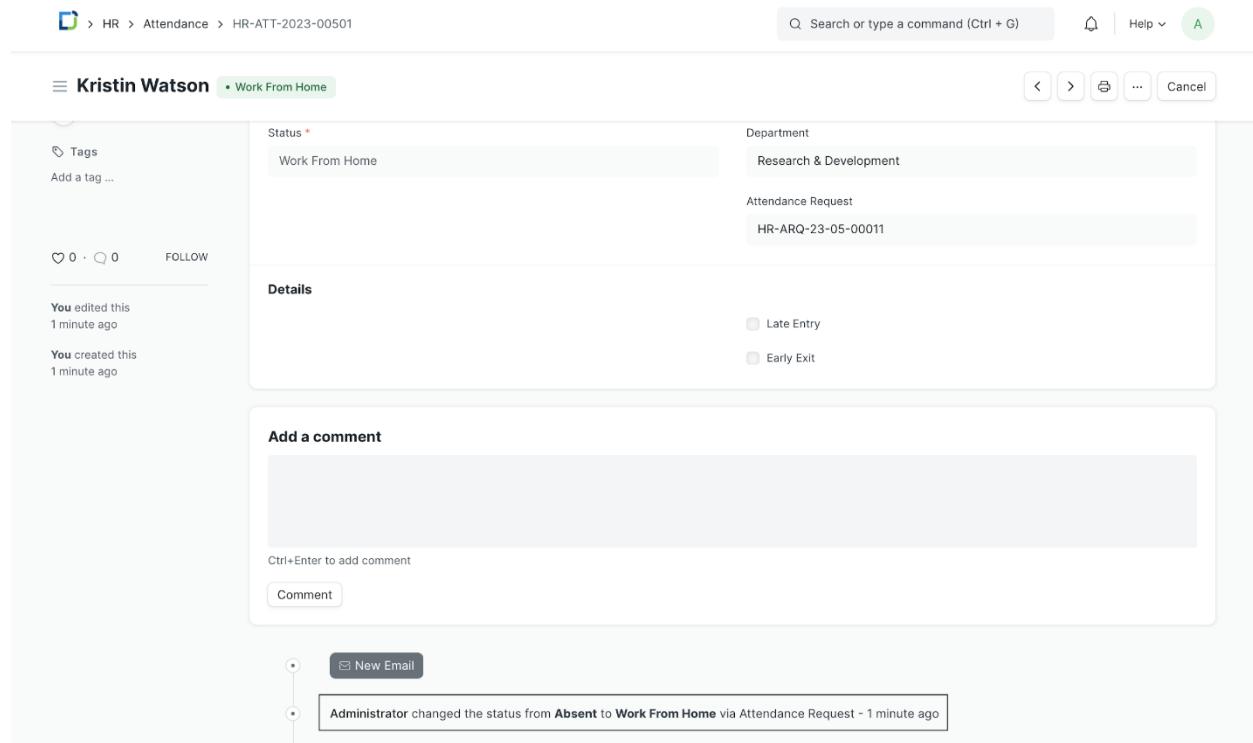
The screenshot shows a list of Attendance records for employee Nabin Baran Hait. The table has columns for Name, Employee, Employee Name, Status, Leave Type, and Last Modified On. Three records are listed, each with a 'Cancel...' button. The last record is highlighted with a red box. The sidebar on the left includes filters for Assigned To, Created By, and Tags, along with buttons for Mark Attendance, List View, and Add Attendance.

Name	Employee	Employee Name	Status	Leave Type	Last Modified On
<input type="checkbox"/> Nabin Baran Hait		Nabin Baran Hait	Cancel...	06-05-2021	HR-ATT-2021-00041
<input type="checkbox"/> Nabin Baran Hait		Nabin Baran Hait	Cancel...	07-05-2021	HR-ATT-2021-00042
<input type="checkbox"/> Nabin Baran Hait		Nabin Baran Hait	Cancel...	05-05-2021	HR-ATT-2021-00040

## 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 shows a software interface for managing attendance requests. At the top, there is a navigation bar with icons for Home, HR, Attendance, and a specific record ID (HR-ATT-2023-00501). To the right of the navigation is a search bar labeled "Search or type a command (Ctrl + G)" and a help button. The main content area is titled "Kristin Watson" and shows a status of "Work From Home". The "Status" field is marked with an asterisk, indicating it is required. The "Department" is listed as "Research & Development". Below this, an "Attendance Request" section shows the ID "HR-ARQ-23-05-00011". On the left, there is a sidebar with "Tags" (with an "Add a tag..." button), a "Details" section showing recent edits and creations (both 1 minute ago), and a "Follow" button. The "Details" section also includes checkboxes for "Late Entry" and "Early Exit". A "Comments" section is present with a "Comment" input field and a "New Email" button. A status message at the bottom indicates that an administrator changed the status from "Absent" to "Work From Home" via an attendance request.

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.

**Rucha Mahabal** Draft

Assigned To +



Attachments +

Reviews +

Tags +

Share +

0 · 0 FOLLOW

You last edited this · just now

You created this · 4 minutes ago

**Connections** ^

Attendance

Employee *	From Date *
HR-EMP-00001	15-11-2023
Employee Name	To Date *
Rucha Mahabal	22-11-2023
Department	<input type="checkbox"/> Half Day
Research & Development	<input checked="" type="checkbox"/> Include Holidays
Company *	Shift
Frappe	Note: Shift will not be overwritten in existing attendance records

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

**Kristin Watson** Draft

Assigned To +



Attachments +

Attach File +

Reviews +

Shared With +

Tags  
Add a tag ...

0 · 0 FOLLOW

You edited this 18 minutes ago

You created this 18 minutes ago

**Attendance Warnings** ^

Attendance for the following dates will be skipped/overwritten on submission

Date	Action on Submission	Reason	Existing Record
28-08-2022	Skip	Holiday	
30-08-2022	Skip	On Leave	
31-08-2022	Overwrite	Attendance already marked	HR-ATT-2023-00491

Employee \* + Company \* +

Employee Name	From Date *
Kristin Watson	28-08-2022
Department	To Date *
Research & Development	02-09-2022
<input type="checkbox"/> Half Day	

## 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

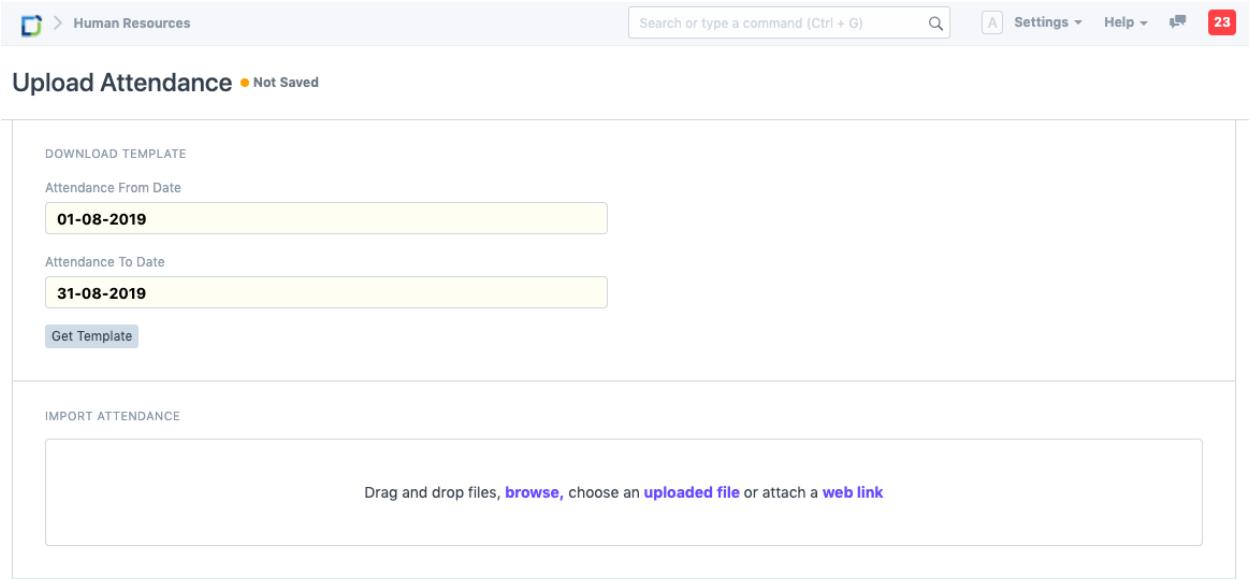
### 2. How to upload attendance in bulk

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:	Employee	Employee Name	Date	Status	Leave Type	Company
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
	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.



Upload Attendance • Not Saved

DOWNLOAD TEMPLATE

Attendance From Date  
01-08-2019

Attendance To Date  
31-08-2019

Get Template

IMPORT ATTENDANCE

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

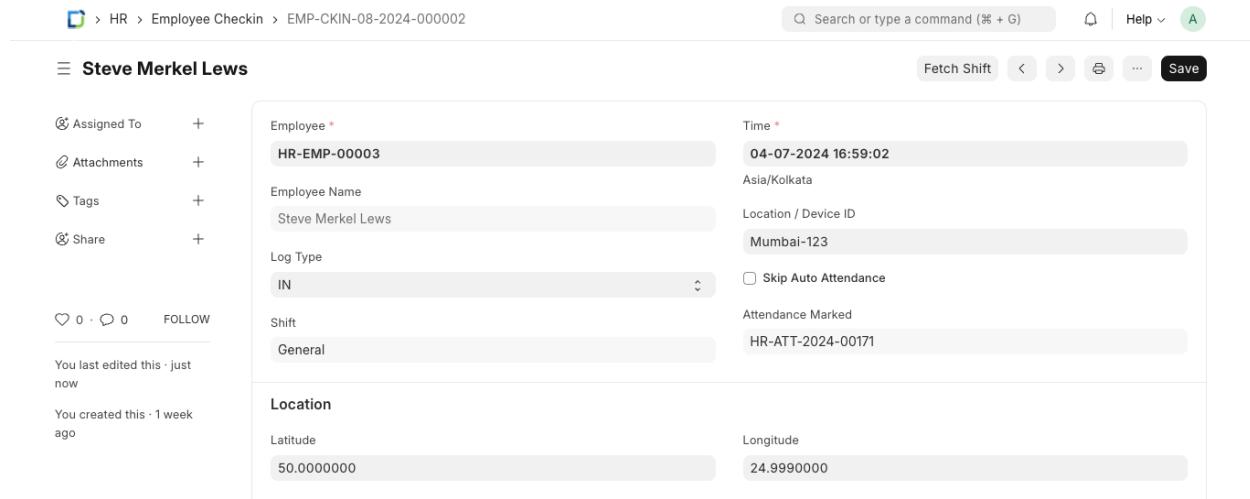
### 2.1 Creating logs manually

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.



The screenshot shows the DellSuite interface for an employee check-in. The top navigation bar includes 'HR > Employee Checkin > EMP-CKIN-08-2024-000002'. The main area is titled 'Steve Merkel Lewis'. The form fields are as follows:

- Assigned To:** HR-EMP-00003
- Employee:** HR-EMP-00003
- Time:** 04-07-2024 16:59:02
- Employee Name:** Steve Merkel Lewis
- Location / Device ID:** Asia/Kolkata
- Log Type:** IN
- Shift:** General
- Attendance Marked:** HR-ATT-2024-00171
- Location:**
  - Latitude:** 50.000000
  - Longitude:** 24.999000

On the left sidebar, there are sections for 'Attachments', 'Tags', and 'Share'. Below the sidebar, there are activity logs: 'You last edited this · just now' and 'You created this · 1 week ago'. The top right of the form has buttons for 'Fetch Shift', '< > ⏪ ⏩ ⏴ ⏵ ⏴ ⏵', and 'Save'.

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

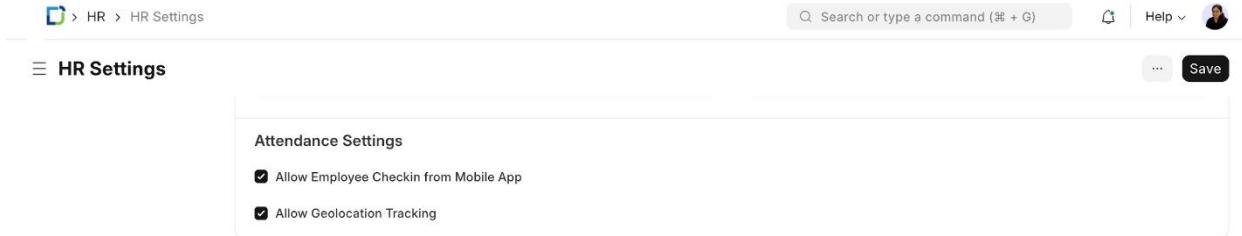
## 2.2 Integrating DellSuite with Biometric Devices

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"



The screenshot shows the 'HR Settings' page with the 'Attendance Settings' section open. It contains two checked checkboxes: 'Allow Employee Checkin from Mobile App' and 'Allow Geolocation Tracking'. The 'Save' button is located in the top right corner of the settings panel.

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.hrdoctype.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.hrdoctype.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

The screenshot shows the 'Shift Type' document for 'Night'. It includes fields for 'Start Time' (20:00:00) and 'End Time' (02:00:00). A 'Holiday List' section is present, and an 'Enable Auto Attendance' checkbox is checked with a note: 'Mark attendance based on 'Employee Checkin' for Employees assigned to this shift.' Buttons for 'Mark Attendance', 'Save', and navigation are at the top right.

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.

The screenshot shows the 'Shift Type' document for 'Night' with the 'Auto Attendance Settings' section expanded. It includes fields for 'Determine Check-in and Check-out' (set to 'Strictly based on Log Type in Employee Checkin'), 'Working Hours Calculation Based On' (set to 'First Check-in and Last Check-out'), 'Begin check-in before shift start time (in minutes)' (set to 60), 'Allow check-out after shift end time (in minutes)' (set to 60), 'Working Hours Threshold for Half Day' (set to 0.0), 'Working Hours Threshold for Absent' (set to 0.0), 'Process Attendance After' (set to 01-11-2021), and 'Last Sync of Checkin' (set to 21-02-2022 18:41:33). A note about marking attendance on holidays is also present.

## 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.

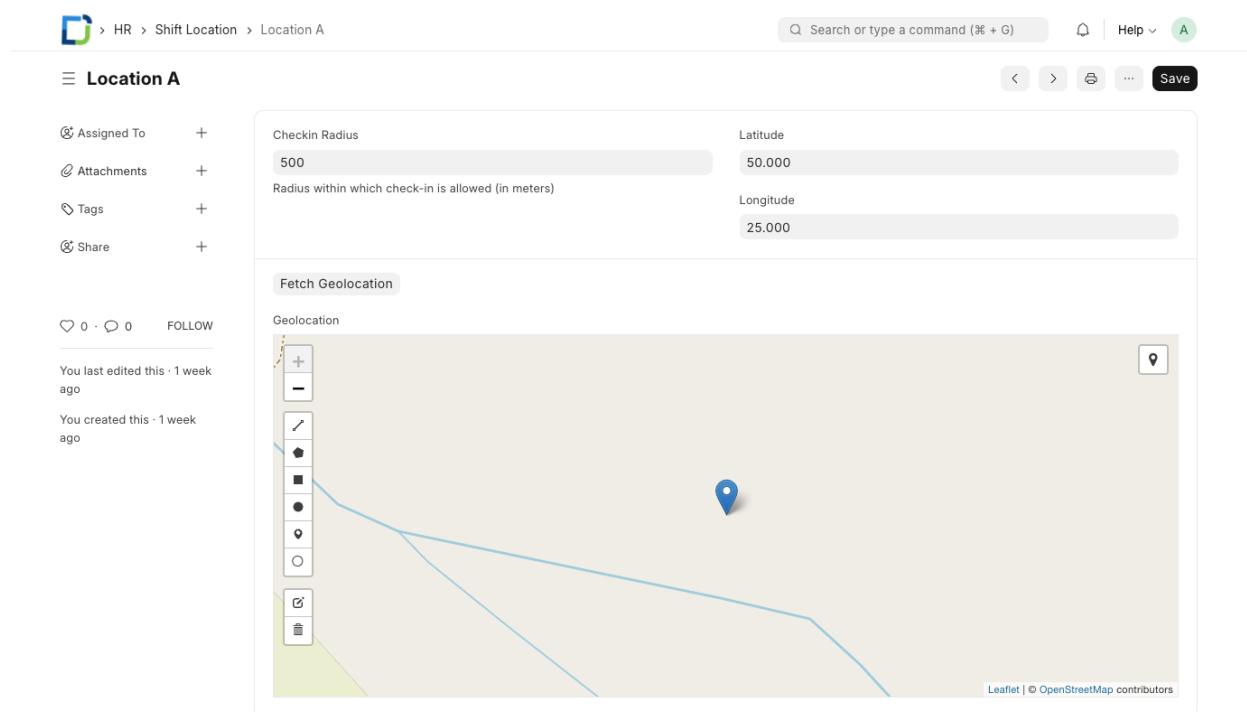
### **Shift Location**

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

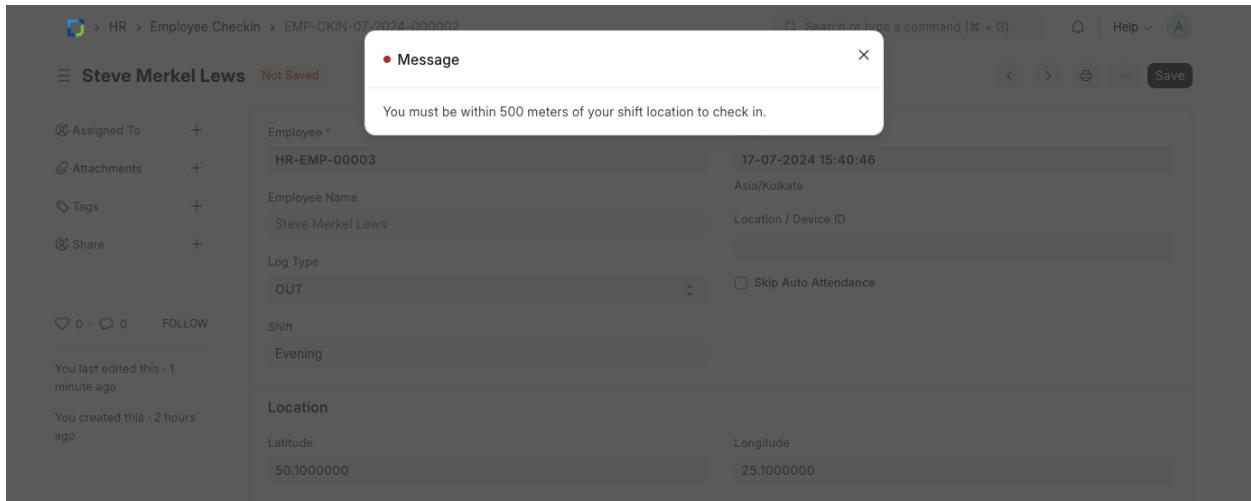
1. Go to the Shift Location list and click on Add Shift Location.
2. Set the Location Name.
3. If you wish to implement geofencing, you will first have to enable Allow Geolocation Tracking under HR Settings.
4. You can now set the Checkin Radius, along with the Latitude and Logitude, or click on the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



The screenshot shows the 'Shift Location' creation page for 'Location A'. The top navigation bar includes a search bar, a help icon, and a save button. The left sidebar lists 'Assigned To', 'Attachments', 'Tags', and 'Share' with a '+' sign. Below the sidebar, there are 'Follow' and 'Edit' buttons, and a note about the last edit (1 week ago). The main form contains fields for 'Checkin Radius' (500 meters), 'Latitude' (50.000), and 'Longitude' (25.000). A 'Fetch Geolocation' button is present. A map interface shows a blue polygon representing the geofence boundary, with a blue location pin in the center. The map includes a zoom control, a location marker, and a copyright notice for Leaflet and OpenStreetMap.

## 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:

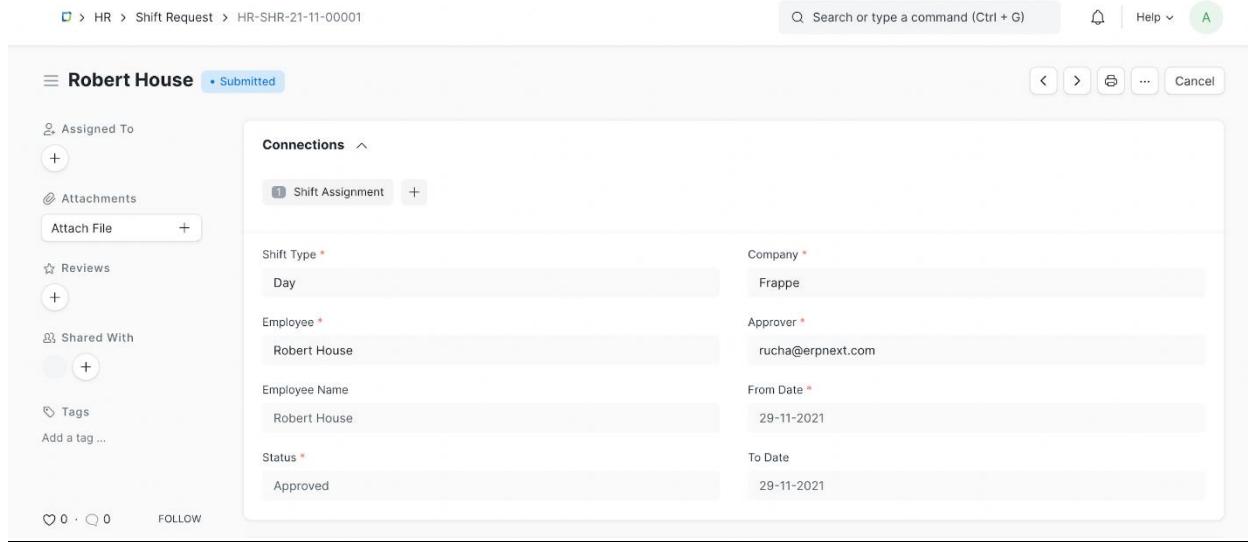
- Employee
- Shift Type

### 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 a Frappe document for a Shift Request. The title bar indicates the path: HR > Shift Request > HR-SHR-21-11-00001. The document header shows "Submitted" and the author "Robert House". The main content area is titled "Connections" and shows a "Shift Assignment" connection. The details for this connection are as follows:

Shift Type *	Company *
Day	Frappe
Employee *	Approver *
Robert House	rucha@erpnext.com
Employee Name	From Date *
Robert House	29-11-2021
Status *	To Date
Approved	29-11-2021

On the left sidebar, there are sections for Assigned To, Attachments (with an "Attach File" button), Reviews, Shared With, and Tags. At the bottom left, there are "FOLLOW" and "FOLLOWER" buttons.

### 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.

No.	Approver *	
1	agatha@frappe.com	<a href="#">Edit</a>
2	anne@gmail.com	<a href="#">Edit</a>

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.

Expense Approver	rucha@erpnext.com
Leave Approver	agatha@frappe.com
Shift Request Approver	rucha@erpnext.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 the Shift Assignment creation form in the Frappe application. The top navigation bar shows the path: Home > HR > Shift Assignment > HR-SHA-22-02-00003. The form is for Isha Joshi, and the status is marked as **Submitted**. The form fields are as follows:

Assigned To	Employee *	Company *
+	Isha Joshi	Frappe
Attachments	Employee Name	Start Date *
Attach File	Isha Joshi	01-01-2022
Reviews	Shift Type *	End Date
+	Midnight Shift	
Shared With	Status	Department
+	Active	Research & Development - F
Tags		

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

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

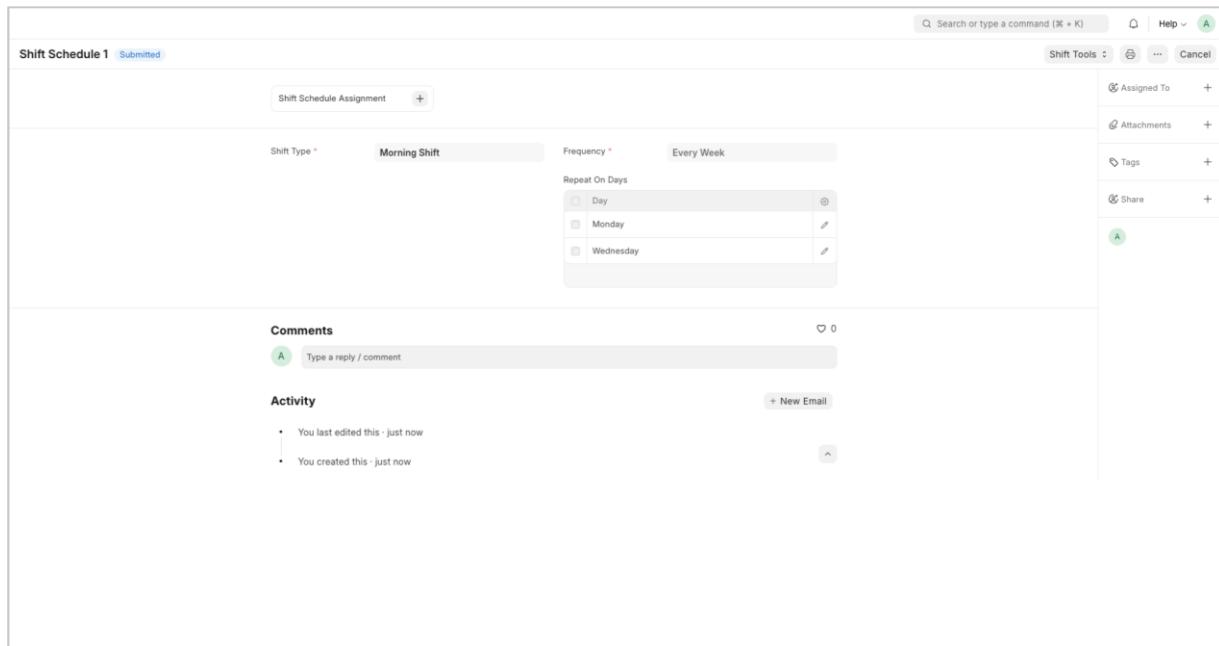
- Shift Type

## 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 shows the 'Shift Schedule' creation page in DellSuite HR. The top navigation bar includes 'Search or type a command (⌘ + K)', 'Help', and a user icon. The main form is titled 'Shift Schedule 1' with a status of 'Submitted'. It contains the following fields:

- Shift Schedule Assignment:** A dropdown menu currently set to 'Morning Shift'.
- Shift Type:** 'Morning Shift'.
- Frequency:** 'Every Week'.
- Repeat On Days:** A list showing 'Day' (selected), 'Monday', and 'Wednesday'.
- Comments:** A text input field with placeholder text 'Type a reply / comment'.
- Activity:** A list showing 'You last edited this - just now' and 'You created this - just now'.
- Shift Tools:** A sidebar with buttons for 'Assigned To', 'Attachments', 'Tags', and '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

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

Type a reply / comment

Activity + New Email

You last edited this - just now

You created this - just now

## 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 *	Company *																																			
Assign Shift	Frappe																																			
Shift Assignment Details																																				
Shift Type *	Start Date *																																			
Night Shift	23-04-2024																																			
Status	End Date																																			
Active																																				
When set to 'Inactive', employees with conflicting active shifts will not be excluded.																																				
Quick Filters ▾																																				
Advanced Filters ▾																																				
Select Employees																																				
<table border="1"> <thead> <tr> <th><input checked="" type="checkbox"/> Employee</th> <th>Employee Name</th> <th>Branch</th> <th>Department</th> <th>Default Shift</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> HR-EMP-00001</td> <td>Akash</td> <td>Bangalore</td> <td>Dispatch</td> <td>Evening</td> </tr> <tr> <td><input checked="" type="checkbox"/> HR-EMP-00002</td> <td>Test</td> <td>Mumbai</td> <td>Dispatch</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/> HR-EMP-00003</td> <td>Steve Merkel Lews</td> <td>New York</td> <td>Management</td> <td>Morning</td> </tr> <tr> <td><input checked="" type="checkbox"/> HR-EMP-00004</td> <td>Jornad</td> <td>Mumbai</td> <td>Management</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/> HR-EMP-00005</td> <td>Joba</td> <td>Mumbai</td> <td>Management</td> <td>Evening</td> </tr> <tr> <td><input checked="" type="checkbox"/> HR-EMP-00006</td> <td>Moga</td> <td>Bangalore</td> <td>Accounts</td> <td>Evening</td> </tr> </tbody> </table>		<input checked="" type="checkbox"/> Employee	Employee Name	Branch	Department	Default Shift	<input checked="" type="checkbox"/> HR-EMP-00001	Akash	Bangalore	Dispatch	Evening	<input checked="" type="checkbox"/> HR-EMP-00002	Test	Mumbai	Dispatch		<input checked="" type="checkbox"/> HR-EMP-00003	Steve Merkel Lews	New York	Management	Morning	<input checked="" type="checkbox"/> HR-EMP-00004	Jornad	Mumbai	Management		<input checked="" type="checkbox"/> HR-EMP-00005	Joba	Mumbai	Management	Evening	<input checked="" type="checkbox"/> HR-EMP-00006	Moga	Bangalore	Accounts	Evening
<input checked="" type="checkbox"/> Employee	Employee Name	Branch	Department	Default Shift																																
<input checked="" type="checkbox"/> HR-EMP-00001	Akash	Bangalore	Dispatch	Evening																																
<input checked="" type="checkbox"/> HR-EMP-00002	Test	Mumbai	Dispatch																																	
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<input checked="" type="checkbox"/> HR-EMP-00005	Joba	Mumbai	Management	Evening																																
<input checked="" type="checkbox"/> HR-EMP-00006	Moga	Bangalore	Accounts	Evening																																

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.

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"/>	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>.

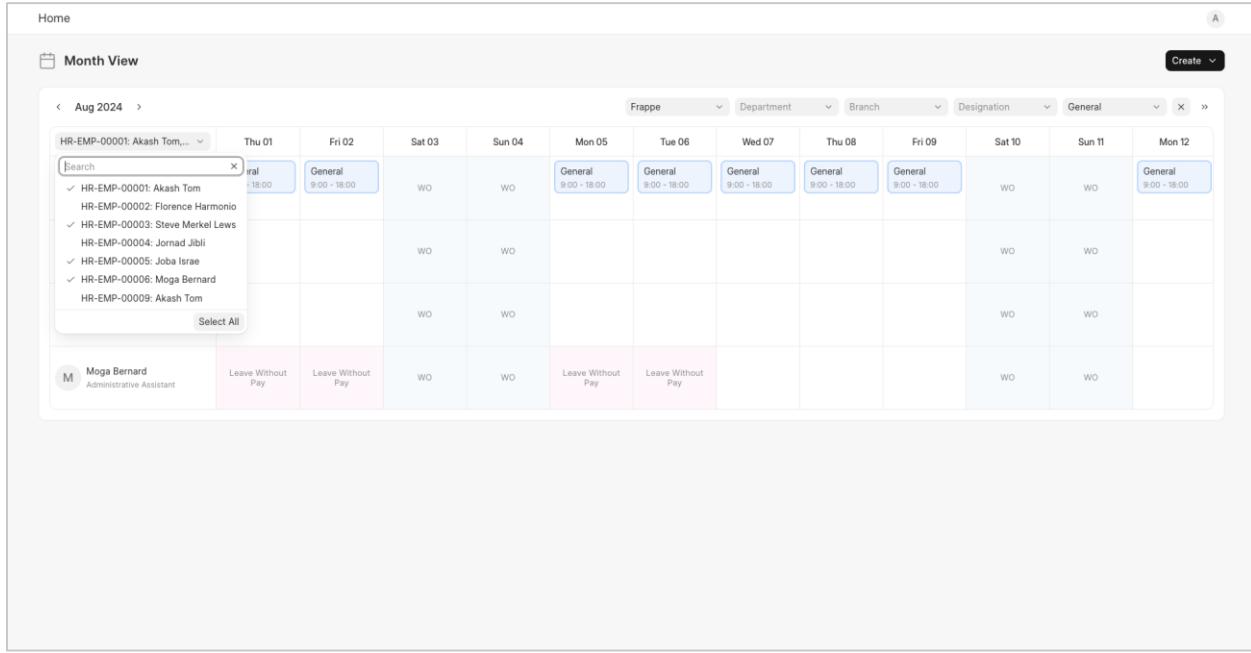
## 3. Features

### 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.



The screenshot shows the Month View roster in Frappe. The interface includes a search bar at the top left, a list of employees with checkboxes on the left, and a 12-column grid for the month. The grid columns are labeled: Thu 01, Fri 02, Sat 03, Sun 04, Mon 05, Tue 06, Wed 07, Thu 08, Fri 09, Sat 10, Sun 11, and Mon 12. Each column contains shift details such as 'General 9:00 - 18:00'. The bottom row shows employee details: Moga Bernard (Administrative Assistant) and Leave Without Pay.

## 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.

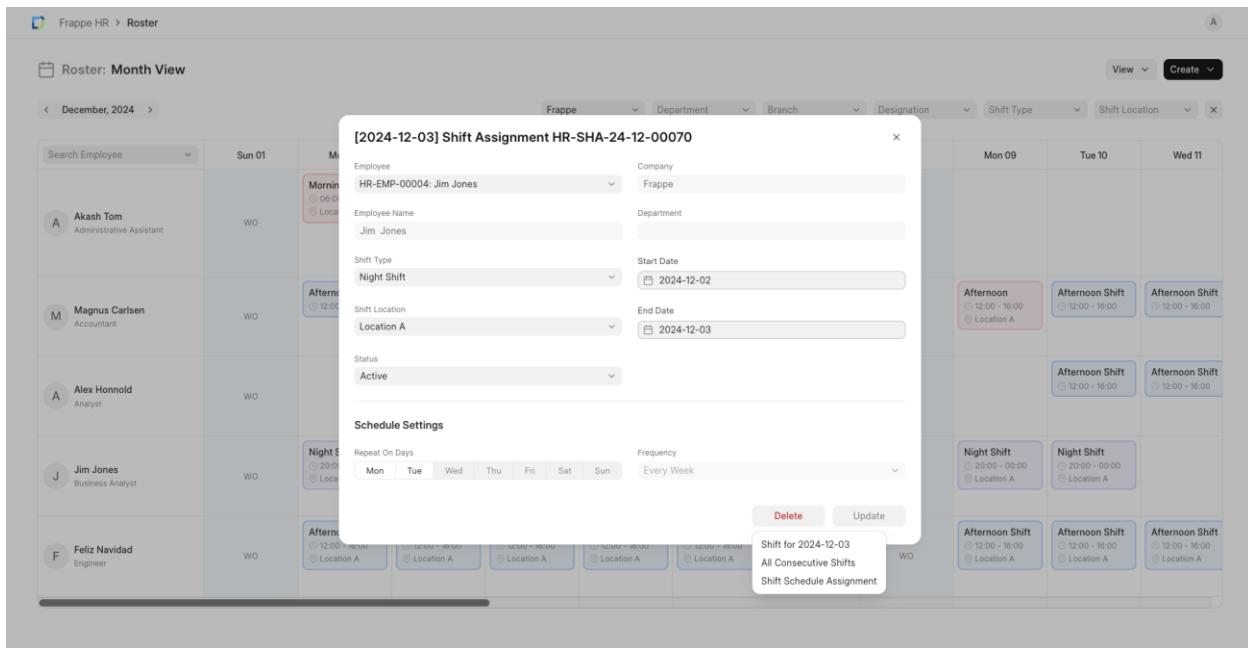
## 3.5 Deleting Shifts

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.

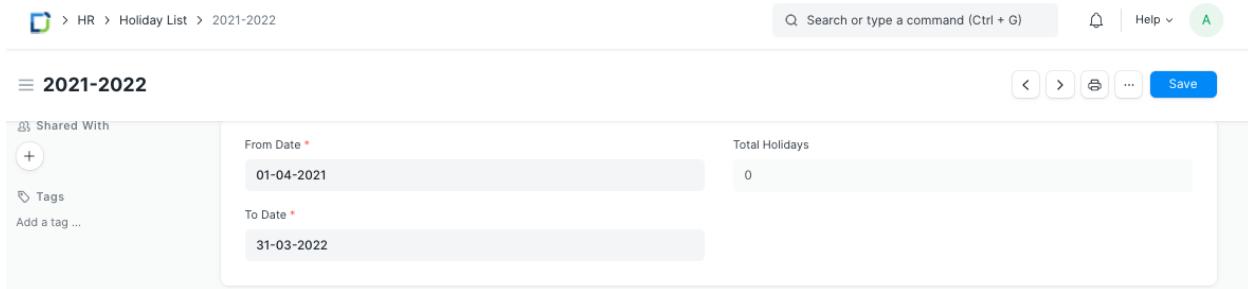
To access Holiday List, go to:

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.



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

From Date \* 01-04-2021

To Date \* 31-03-2022

Total Holidays 0

Save

## 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?**

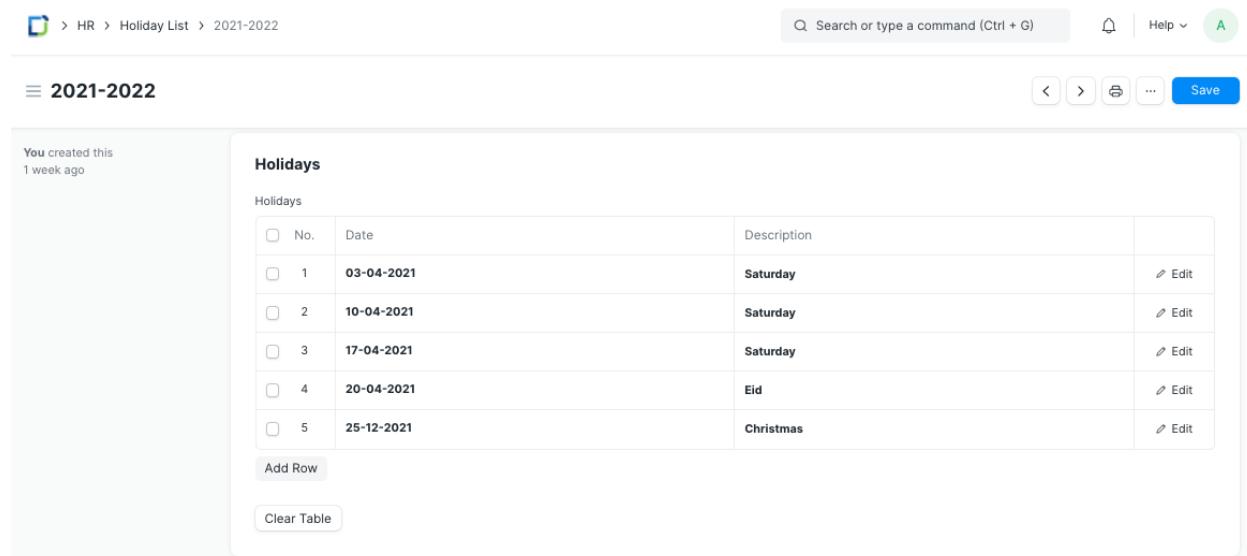
DellSuite HR uses an external package Holidays to get predictable holiday dates for countries. These are the list of countries supported:

<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

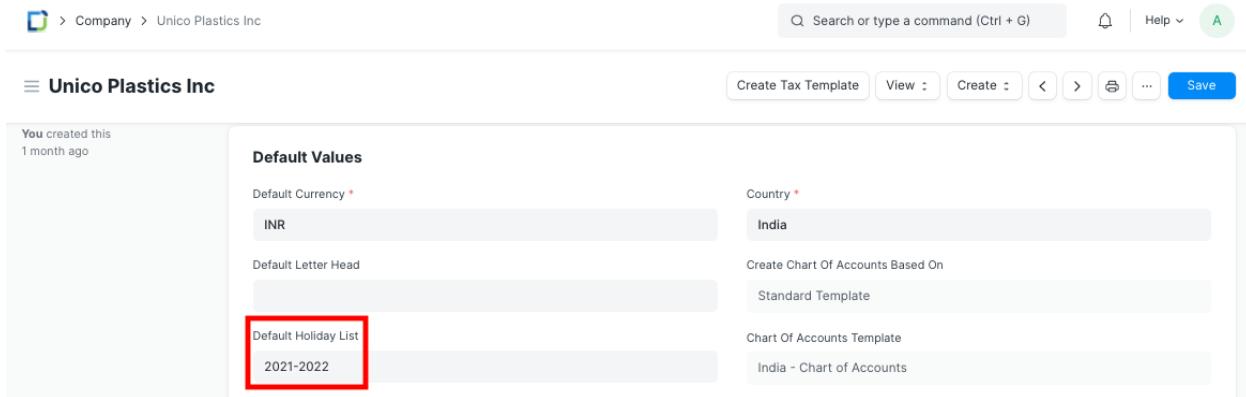
You can also add specific days manually by clicking on the 'Add row' option in the Holidays table.



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

## 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.



You created this 1 month ago

**Default Values**

Default Currency *	INR	Country *	India
Default Letter Head	Create Chart Of Accounts Based On Standard Template		
Default Holiday List	2021-2022	Chart Of Accounts Template	India - Chart of Accounts

## 4. Holiday List in Employee

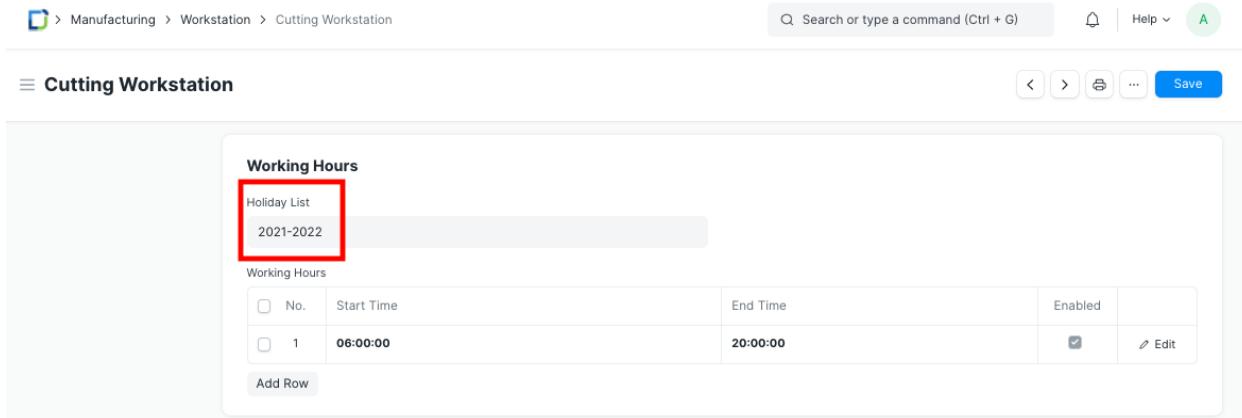
If you have created multiple Holiday List, select a specific Holiday List for an Employee in the respective master.

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.



The screenshot shows the 'Cutting Workstation' configuration screen. The 'Working Hours' section is open, displaying a 'Holiday List' for '2021-2022'. Below this, a table lists working hours with a single row: No. 1, Start Time 06:00:00, End Time 20:00:00, and Enabled checked. A 'Save' button is located in the top right corner.

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

Privilege Leave Not Saved

Leave Allocation 2 + Attendance +

Leave Application 1 1 + Leave Encashment +

Assigned To +

Attachments +

Reviews +

Tags +

Share +

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.

Maximum Leave Allocation Allowed 10.000	<input type="checkbox"/> Is Carry Forward
Applicable After (Working Days) 60	<input checked="" type="checkbox"/> Is Partially Paid Leave
Maximum Consecutive Leaves Allowed 4	Fraction of Daily Salary per Leave * 0.500
For a day of leave taken, if you still pay (say) 50% of the daily salary, then enter 0.50 in this field.	
<input type="checkbox"/> Is Optional Leave	
These leaves are holidays permitted by the company however, availing it is optional for an Employee.	

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

## 2. Features

### 2.1 Leave Encashment

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

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

Encashment

Allow Encashment

Maximum Encashable Leaves  
0

Non-Encashable Leaves  
5

Indicates the number of leaves that cannot be encashed from the leave balance. E.g. with a leave balance of 10 and 4 Non-Encashable Leaves, you can encash 6, while the remaining 4 can be carried forward or expired

Earning Component  
Leave Encashment

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.

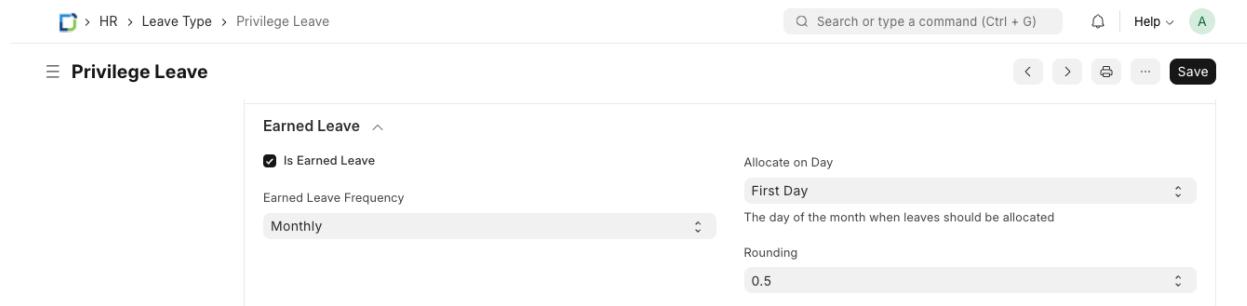
**Earning Component:** This field allows you to specify the Salary Component that will be encashed to Employees as a part of their Salary in the Salary Slip.

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.



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.

## 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.

No.	Leave Type	Annual Allocation	
1	Sick Leave	10	<a href="#">Edit</a>
2	Casual Leave	10	<a href="#">Edit</a>
3	Privilege Leave	10	<a href="#">Edit</a>
4	Leave Without Pay	5	<a href="#">Edit</a>
5	Compensatory Off	5	<a href="#">Edit</a>

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

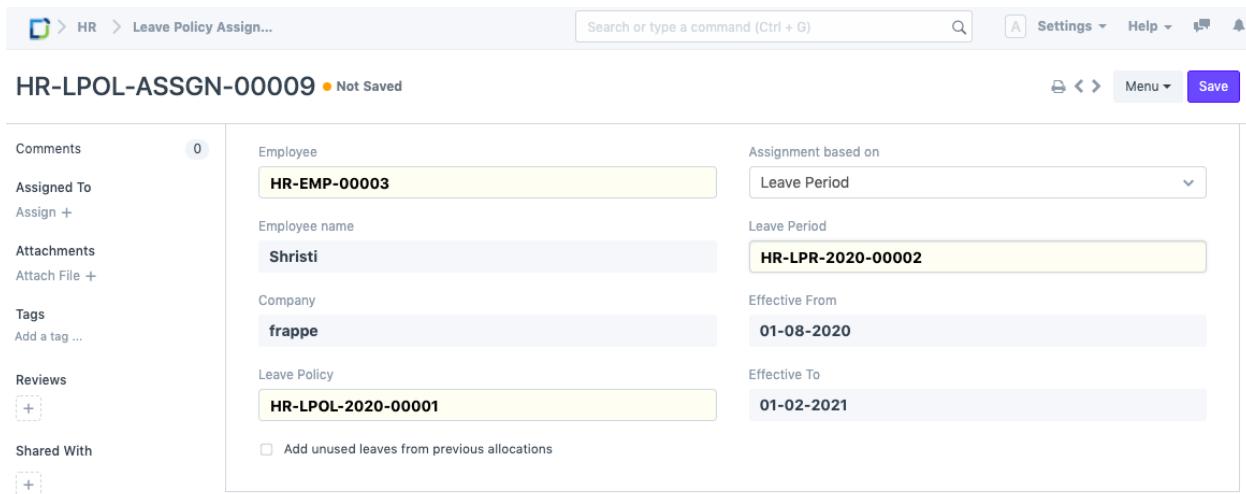
### 1. Prerequisites

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.



The screenshot shows the 'Leave Policy Assign...' screen in a software application. The top navigation bar includes 'HR' and 'Leave Policy Assign...'. A search bar and a 'Save' button are on the right. The main area displays a form for creating a new assignment:

Comments	0	Employee	Assignment based on
Assigned To	Assigned To	HR-EMP-00003	Leave Period
Attachments	Attachments	Employee name	Leave Period
Tags	Tags	Shristi	HR-LPR-2020-00002
Reviews	Reviews	Company	Effective From
Shared With	Shared With	frappe	01-08-2020
		Leave Policy	Effective To
		HR-LPOL-2020-00001	01-02-2021
		<input type="checkbox"/> Add unused leaves from previous allocations	

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

Name	Status	Employee	Employee Name	Leave Type	Last Modified On
HR-LAL-2020-00031	Submitted	HR-EMP-00003	Shristi	Privilege Leave	R-LAL-2020-00031 2 m
HR-LAL-2020-00030	Submitted	HR-EMP-00003	Shristi	Casual Leave	R-LAL-2020-00030 2 m

### 3. Features

#### 3.1 Bulk Leave Policy Assignment

DellSuite HR also allows creating Leave Policy Assignments for multiple employees at once.

1. Go to the Leave Policy Assignment list.
2. Click on Bulk Leave Policy Assignment.
3. This will take you to the Leave Control Panel, where you can assign Leave Policies in bulk.

ID	Employee	Employee name	Company	Leave Policy
----	----------	---------------	---------	--------------

#### 3.2 Allocating Earned Leaves

Leave Policy Assignments can also be used to allocate Earned Leaves.

# 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.

Shared With

Tags

Employee \*

HR-EMP-00001

Leave Type \*

Privilege Leave

Employee Name

Albert Einstein

From Date \*

29-04-2021

Company \*

Unico Plastics Inc

To Date \*

31-03-2022

0 FOLLOW

You edited this just now

You created this just now

**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

Emily Blunt Submitted

View Ledger Actions + Cancel

Expire Allocation  
Allocate Leaves

Employee Leave Balance

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

Employee Name Emily Blunt From Date \* 01-01-2024

Department Research & Development To Date \* 31-12-2024

Company \* Frappe

**Allocation**

New Leaves Allocated 1 Compensatory Leave Request

Add unused leaves from previous allocations Leave Period

Total Leaves Allocated \* 15 Leave Policy Assignment HR-LPOL-ASSGN-00108

Notes ▾

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

Emily Blunt Submitted

View Ledger Actions + Cancel

Manual Leave Allocation

New Leaves to be Allocated \* 2.00

From Date 18-12-2024

To Date 31-12-2024

Employee \* HR-EMP-00021: Emily Blunt

Employee Name Emily Blunt From Date \* 01-01-2024

Department Research & Development To Date \* 31-12-2024

Company \* Frappe

**Allocation**

New Leaves Allocated 1 Compensatory Leave Request

Add unused leaves from previous allocations Leave Period

Total Leaves Allocated \* 25 Leave Policy Assignment HR-LPOL-ASSGN-00108

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.

## Leave Control Panel

Allocate Leave

## Set Leave Details

Dates Based On

 Allocate Based On Leave Policy

Leave Period

▼

Leave Policy \*

Leave Period \*

HR-LPOL-2023-00001

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

## Quick Filters ▲

Company

Employment Type

Frappe

Branch

Designation

Department

Employee Grade

## Advanced Filters ▲

Full Name

Like

akash

x

+ Add a Filter

Clear Filters

## Select Employees

<input type="checkbox"/> Employee	Name	Company	Department
<input type="checkbox"/>			
<input checked="" type="checkbox"/> 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

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

- Leave Allocation

ID	Employee	Employee Name	Leave Type	Leave Period	Leave Policy		Last Updated On
<input type="checkbox"/>		Employee Name	Status	Employee	Leave Type	ID	2 of 2
<input type="checkbox"/>		Akash Tom	Submitted	HR-EMP-00001	Sick Leave	HR-LAL-2023-00002	- 1m 0 0
<input type="checkbox"/>		Akash Tom	Submitted	HR-EMP-00001	Casual Leave	HR-LAL-2023-00001	- 1m 0 0

## 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.

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

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	Leave Type
HR-LAP-.YYYY.-	Privilege Leave
Employee	Department
HR-EMP-00001	Research & Development - UP
Employee Name	Leave Balance Before Application
George Smith	19
From Date	Reason
04-03-2020	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	Status
prasad@erpnext.com	Open
Leave Approver Name	Salary Slip
Prasad Ramesh	Sal Slip/HR-EMP-00001/00002
Posting Date	Company
30-03-2020	Unico Plastics Inc.
<input checked="" type="checkbox"/> Follow via Email	Letter Head
Color	Horizon Technologies
#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

Shared With

LEAVE APPROVERS

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

Leave Approver

	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

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.

The screenshot shows a software application window for creating a new compensatory leave request. The top navigation bar includes a logo, the path 'HR > Compensatory Leave Request > new-compensatory-leave-request-1', a search bar, a help icon, and a save button. The main form is titled 'New Compensatory Leave Request' and is marked as 'Not Saved'. It contains the following fields:

- Employee:** HR-EMP-00001 (selected), Employee Name: Albert Einstein
- Leave Type:** Compensatory Off
- Worked On Holiday:**
  - Work From Date:** 15-04-2021
  - Work End Date:** 16-04-2021
  - Reason:** Customer Training
  - Half Day

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.

HR-ENC-2019-00001 • Submitted

Comments	0	Leave Period	HR-LPR-2019-00001	Leave Allocation	HR-LAL-2019-00006
Assigned To		Employee	HR-EMP-00004: Kim John	Leave Balance	10
Attachments		Employee Name	Kim John	Encashable days	5
Tags		Leave Type	Casual Leave		
Reviews		PAYROLL			
Shared With		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.

Block List

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

No.	Block Date	Reason
1	28-05-2021	AGM
2	31-05-2021	Annual get together

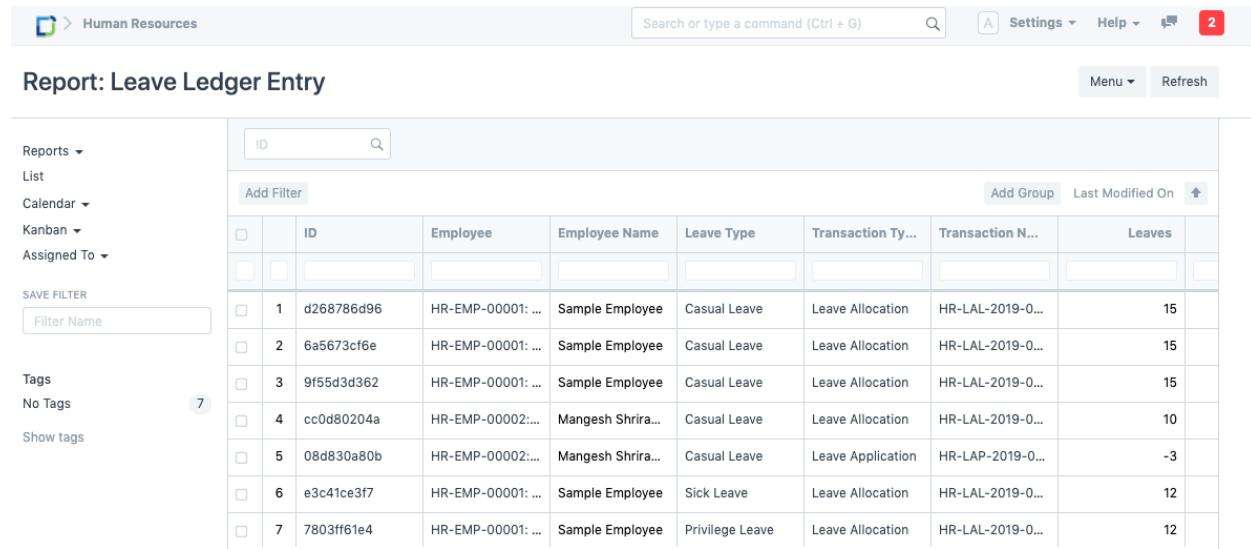
Allow Users

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.



Report: Leave Ledger Entry								
Reports ▾		List						
List		Add Filter						
Reports ▾		ID	Employee	Employee Name	Leave Type	Transaction Ty...	Transaction N...	
List							Leaves	
Calendar ▾								
Kanban ▾								
Assigned To ▾								
SAVE FILTER								
Filter Name								
Tags								
No Tags								
Show tags		7						
<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 Shri...	Casual Leave	Leave Allocation	HR-LAL-2019-0...	10
<input type="checkbox"/>	5	08d830a80b	HR-EMP-00002:...	Mangesh Shri...	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										Actions	...
01-01-2023		31-12-2023		Leave Type		Employee		Active		Frappe	
Department		Transaction Type		Transaction Name							
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	<input checked="" type="checkbox"/>			
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

Connections

No.	KRA *	Weightage (%) *
1	Development	30%
2	Design	30%
3	Quality	20%
4	Documentation	10%
5	Automation	10%

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

You edited this 2 days ago

You created this 7 months ago

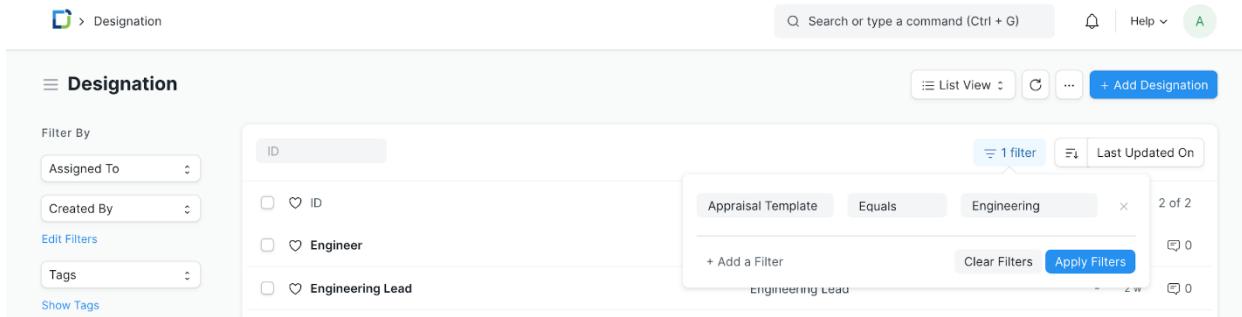
Once you create the templates, you can link them to the respective Designations.

Designation > Engineering Lead

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.

The screenshot shows the Odoo Appraisal Cycle interface for the 23-24 cycle. The cycle is marked as 'In Progress'. The interface includes the following sections:

- Overview**: Shows Appraisees: 4, Self Appraisal Pending: 3, Employees without Feedback: 3, and Employees without Goals: 4.
- Applicable For**: Shows Company: Frappe, Start Date: 01-04-2023, End Date: 31-03-2024, Status: In Progress.
- Stats**: Shows 4 Appraisals, 4 Employee Performance Feedback, and 1 Goal.
- Connections**: Shows 4 Appraisals, 1 Employee Performance Feedback, and 1 Goal.
- Description**:
  - Settings**: KRA Evaluation Method is set to 'Automated Based on Goal Progress'.
  - Calculate Final Score based on Formula** checkbox is checked. The formula entered is: `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.

Goal Tree

Frappé 22-23 Employee Date Range

22-23

- Move Documentation to new website (Rucha Mahabal) Documentation Completed
- Redesign (Kristin Watson) Design
  - Redesign Performance Module (Kristin Watson) Design In Progress
  - Redesign websites (Kristin Watson) Design In Progress
- Development (Kristin Watson) Development
  - Recruitment Module (Kristin Watson) Development In Progress
  - Performance Improvements in Payroll (Kristin Watson) Development Completed
- Documentation for new products (Kristin Watson) Documentation
  - 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

Collapse All Expand All ... + New

## 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

Employee Lifecycle > Appraisal Cycle > 22-23

22-23 • Not Saved

Assigned To

Attachments

Reviews

Shared With

Tags

View Goals Create Appraisals Mark as Completed

Search or type a command (Ctrl + G)

Help

Overview Applicable For

Stats

- Appraisees: 4
- Self Appraisal Pending: 2
- Employees without Feedback: 3
- Employees without Goals: 2

Connections

- Appraisal: 4
- Employee Performance Feedback: 1
- Goal: 12

Company: Frappe

Start Date: 01-04-2022

Status: In Progress

End Date: 31-03-2023

0 FOLLOW

## 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 (%).

Kristin Watson • Not Saved

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

Search or type a command (Ctrl + G)

View Goals | Help | A

Assigned To: Kristin Watson

Attachments: kristin.jpeg

Reviews: +100

Shared With: Kristin Watson

Tags: Add a tag ...

0 likes, 2 comments, FOLLOW

Kristin Watson edited this 59 minutes ago

You created this 6 months ago

Appraisal Template: Engineering

Rate Goals Manually

KRA vs Goals

No.	KRA *	Weightage (%) *	Goal Completion (%)	Goal Score (weighted)	Edit
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)

Mohan Rai • Draft

Submit this document to confirm

Appraisal Template • Engineering

Rate Goals Manually

No.	Goal *	Weightage (%) *	Score (0-5)	Score Earned
1	Development	30	5	1.50
2	Design	30	4	1.20
3	Quality	20	3	0.60
4	Documentation	10	5	0.50
5	Automation	10	2	0.20

Add Row

Remarks

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.

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

Search or type a command (Ctrl + G)

Kristin Watson Draft

Submit this document to confirm

Overview KRAs **Feedback** Self Appraisal

**3.51**  
2 reviews  
3.51 out of 5

1 star 0%  
2 star 0%  
3 star 100%  
4 star 0%  
5 star 0%

**Kevin Edward**  
Engineering Lead  
3.38

6 days ago

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

**Rucha Mahabal**  
Engineer  
3.63

1 week ago

Amazing work with the new product. Keep doing great stuff!  
Can improve on the documentation and UX side. Study more user personas to avoid shallow solutioning.  
Consistently learns new skills and uses them to improve performance and provide suggestions for betterment of the job  
Can speak up more and convey your opinions

Assigned To  
Attachments  
kristin.jpeg  
Attach File  
Reviews  
+100  
Shared With  
Tags

0 - 2 FOLLOW

Kristin Watson edited this 1 hour ago  
You created this 6 months ago

Note: Only submitted feedback documents are visible in this history and the view is permission sensitive.

In every review, you can see the reviewer, their designation, avg rating given to the employee, the feedback and the time when the feedback was given. You can also click on the link icon to see the entire Employee Performance Feedback document.

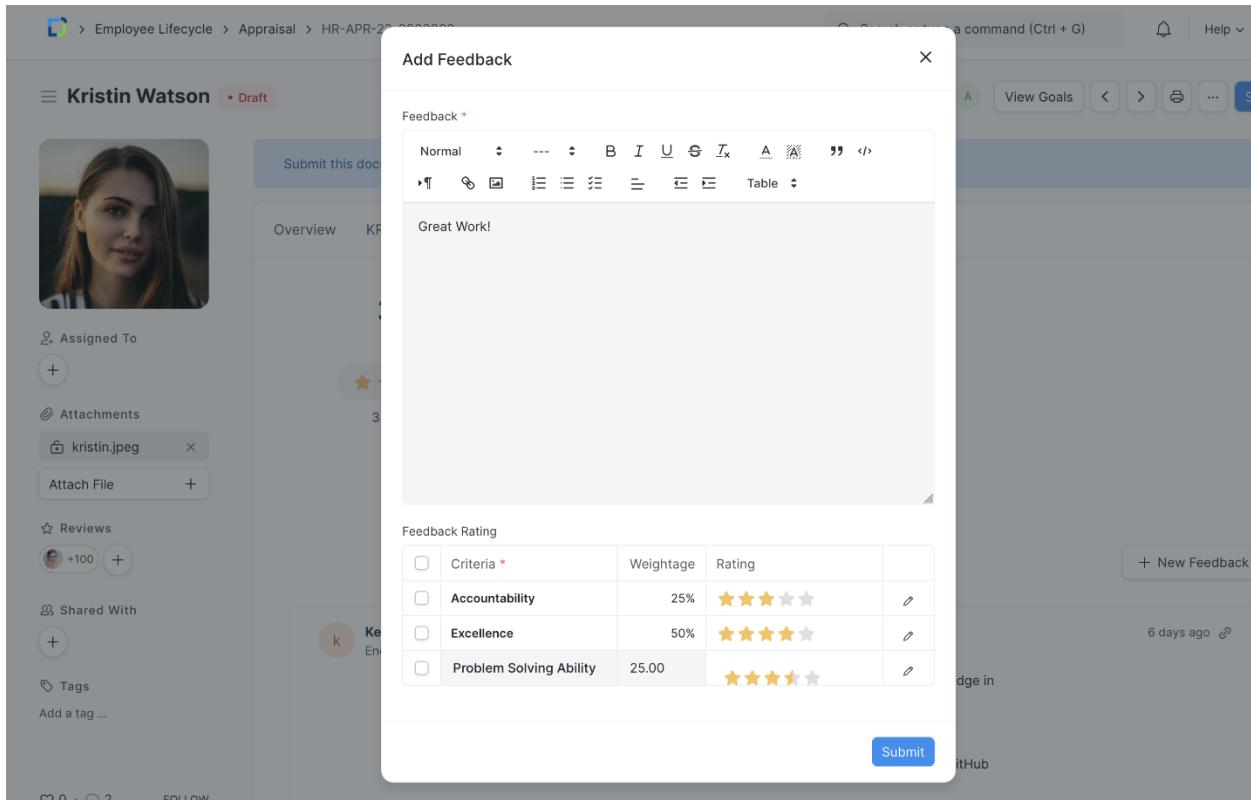
**Kevin Edward**  
Engineering Lead  
3.38

6 days ago

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

Open Feedback

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



### 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.

Kristin Watson • Not Saved

Submit this document to confirm

Overview KRAs Feedback Self Appraisal

Ratings

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

Add Row

Total Self Score  
3.25

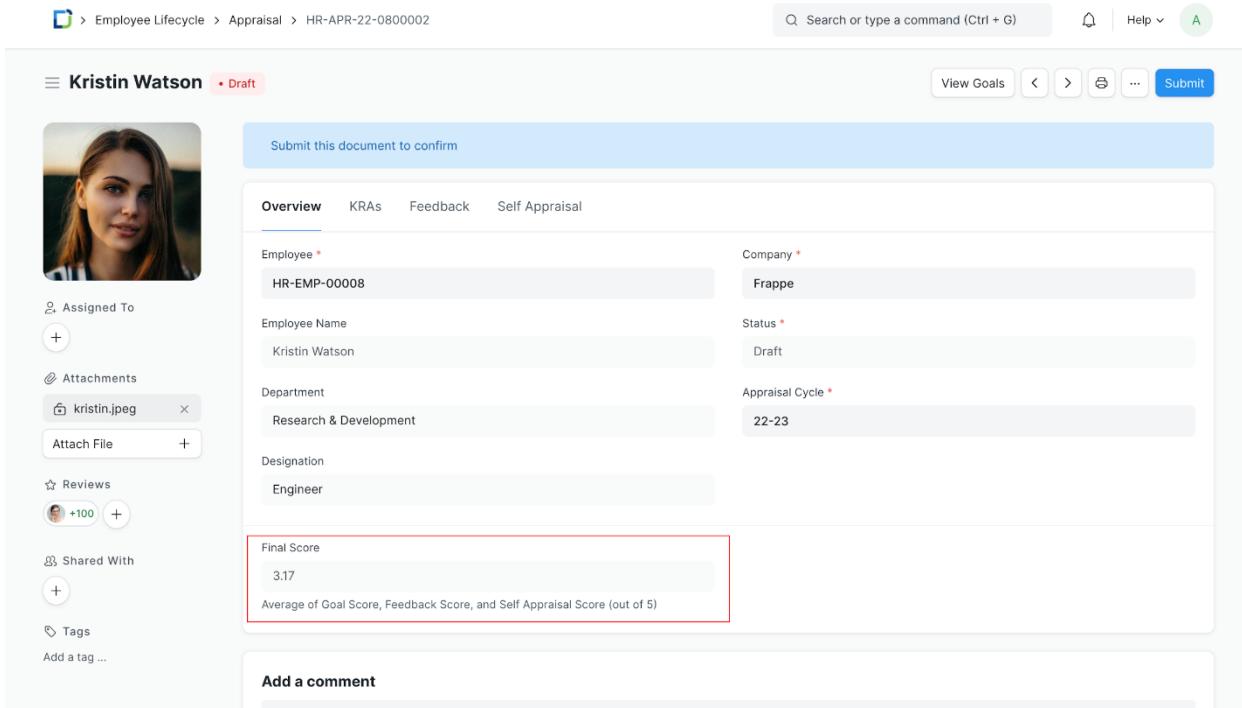
Reflections

This has been an amazing quarter for me.

Things that worked well:

### 3.4 Final Score Calculation

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



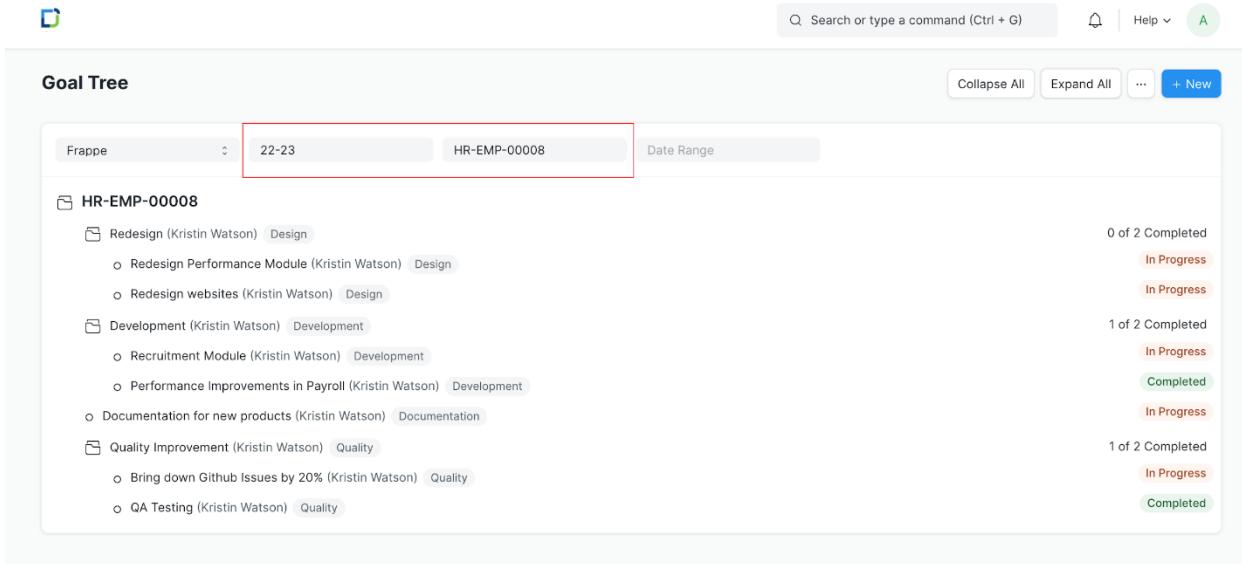
The screenshot shows the 'Employee Lifecycle > Appraisal > HR-APR-22-0800002' page for Kristin Watson. The page is in 'Draft' mode. The main content area is titled 'Kristin Watson' and shows an image of Kristin Watson. Below the image, there are tabs for 'Overview', 'KRAs', 'Feedback', and 'Self Appraisal'. The 'Overview' tab is selected. It contains the following data:

Employee *	HR-EMP-00008	Company *	Frappe
Employee Name	Kristin Watson	Status *	Draft
Department	Research & Development	Appraisal Cycle *	22-23
Designation	Engineer		

Below this, a box highlights the 'Final Score' of 3.17, described as the 'Average of Goal Score, Feedback Score, and Self Appraisal Score (out of 5)'. To the left of the main content, there are sidebar sections for 'Assigned To', 'Attachments' (with a file named 'kristin.jpeg'), 'Reviews' (with a '+100' button), 'Shared With', and 'Tags'.

## 3.5 View Goals

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



The screenshot shows the 'Goal Tree' view for the 'Frappe' company in the '22-23' appraisal cycle, for employee 'HR-EMP-00008'. The search bar at the top is empty. The main area displays a hierarchical list of goals:

- HR-EMP-00008**
  - Redesign (Kristin Watson) - Design
    - Redesign Performance Module (Kristin Watson) - Design
    - Redesign websites (Kristin Watson) - Design
  - Development (Kristin Watson) - Development
    - Recruitment Module (Kristin Watson) - Development
    - Performance Improvements in Payroll (Kristin Watson) - Development
  - Documentation for new products (Kristin Watson) - Documentation
  - Quality Improvement (Kristin Watson) - Quality
    - Bring down Github Issues by 20% (Kristin Watson) - Quality
    - QA Testing (Kristin Watson) - Quality

Each goal is accompanied by its status: '0 of 2 Completed' (Completed), '1 of 2 Completed' (Completed), and '1 of 2 In Progress' (In Progress). Buttons for 'Collapse All', 'Expand All', and '+ New' are located at the top right of the goal tree.

## 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

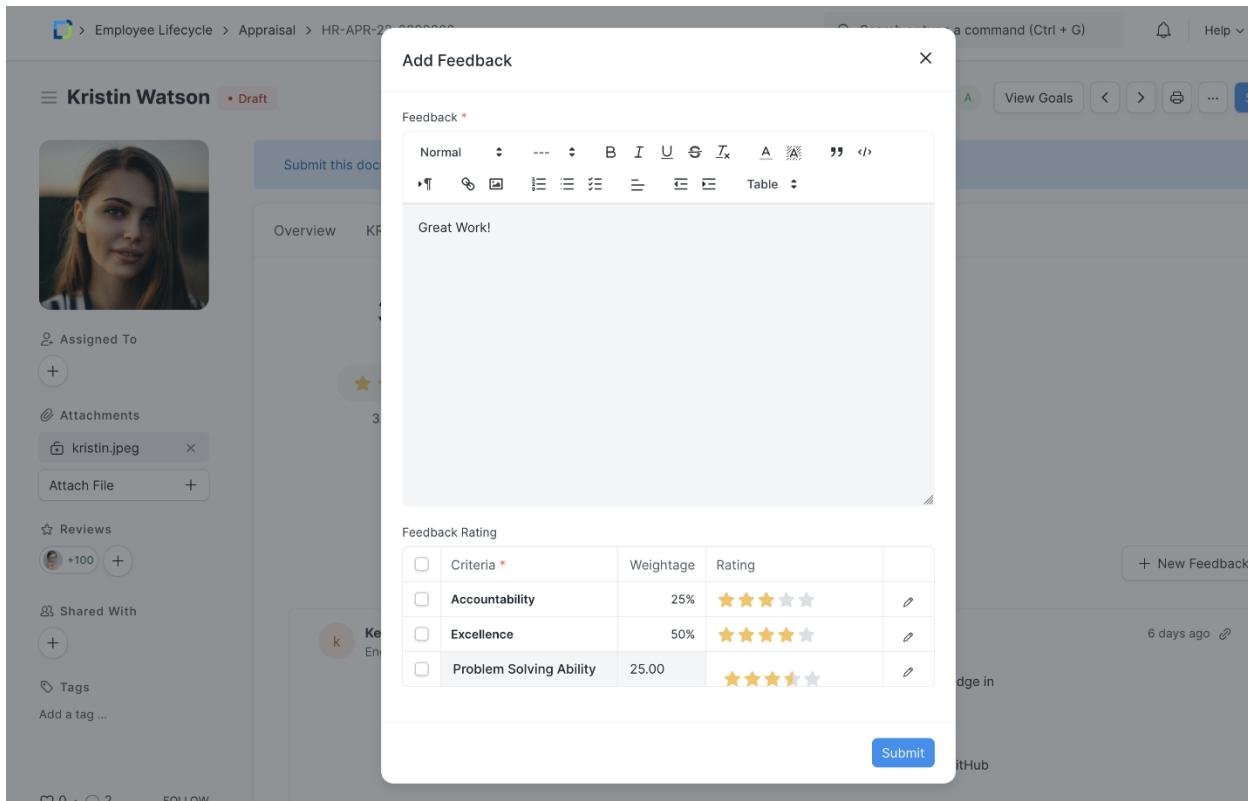
Before creating a Performance Feedback, you should create the following:

- [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.

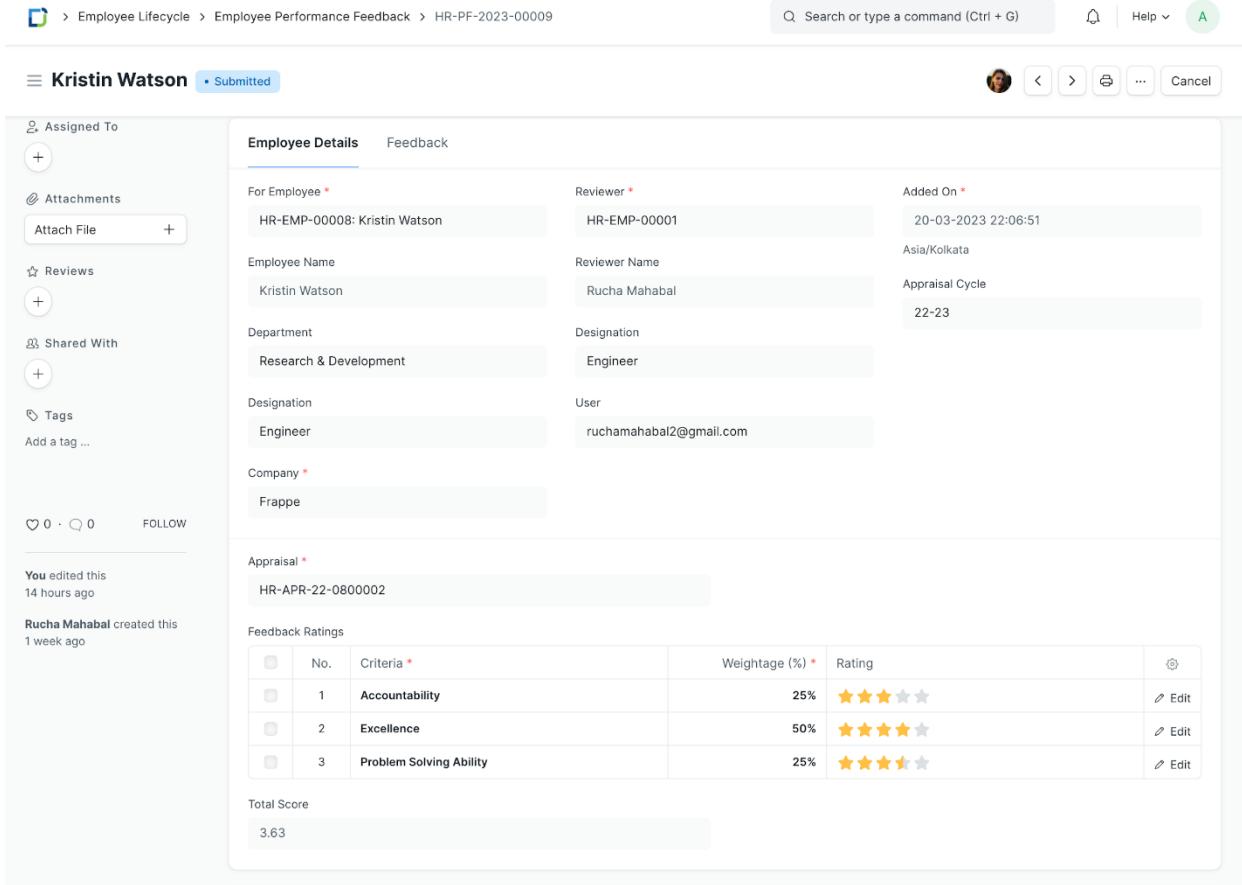


For more details about the feedback timeline check [Appraisal](#)

### 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.



The screenshot shows the Frappe application interface for 'Employee Performance Feedback' for employee 'Kristin Watson'. The page is titled 'Submitted' and includes the following sections:

- Employee Details:** Shows '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), 'Department' (Research & Development), 'Designation' (Engineer), 'Appraisal Cycle' (22-23), 'Designation' (User), 'Email' (ruchamahabal2@gmail.com), and 'Company' (Frappe).
- Appraisal:** Shows 'Appraisal' (HR-APR-22-080002).
- Feedback Ratings:** A table showing ratings for three criteria:
 

No.	Criteria *	Weightage (%) *	Rating	Actions
1	Accountability	25%	★★★☆☆	<input type="button" value="Edit"/>
2	Excellence	50%	★★★★☆	<input type="button" value="Edit"/>
3	Problem Solving Ability	25%	★★★★★	<input type="button" value="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](#)

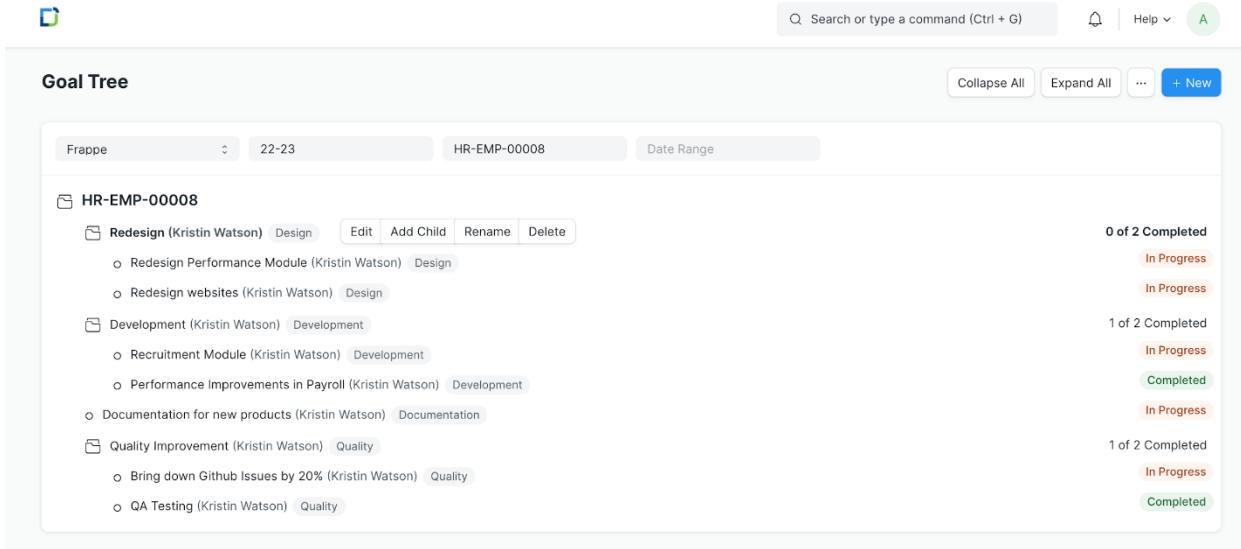
If you want the goal's progress to impact your appraisals, you will also need to create:

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

### 2. Goal Setting

## 2.1 From the tree view

Since goals have a hierarchical structure, it's 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.

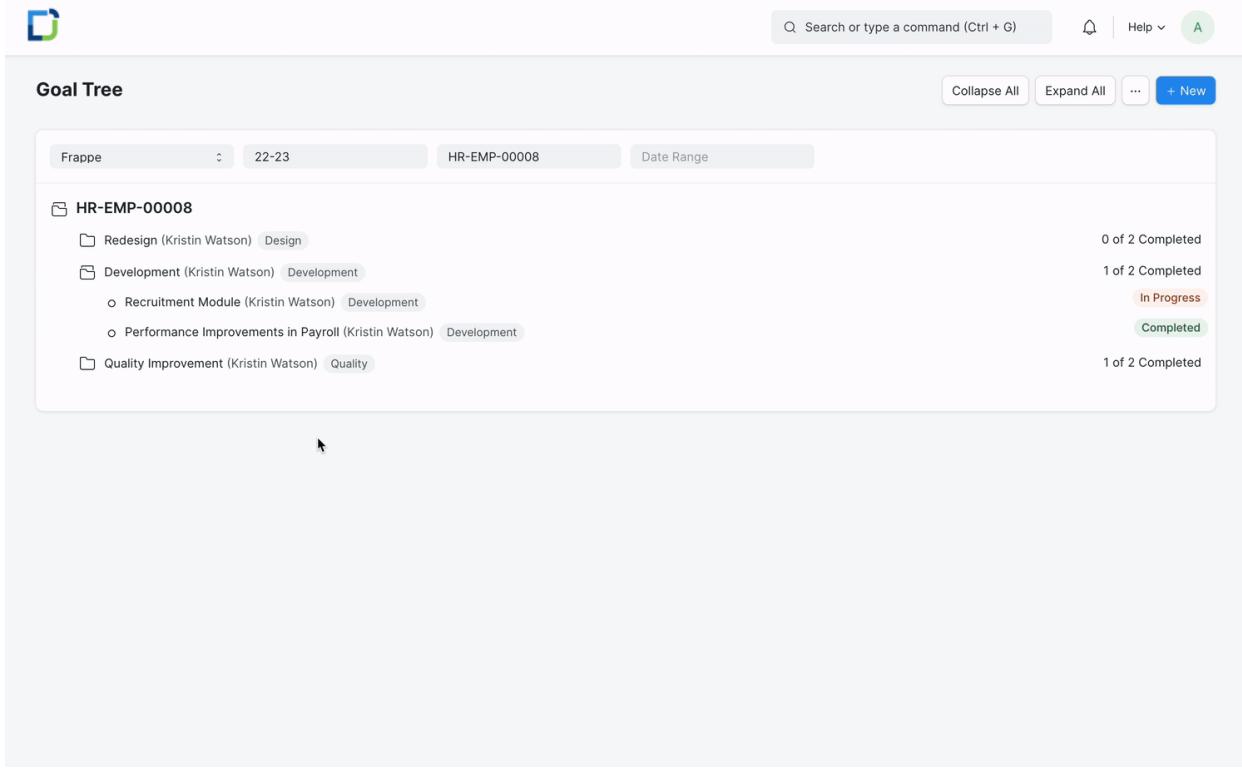


The screenshot shows the Frappe Goal Tree interface. At the top, there are search and command fields, a help icon, and a user profile icon. Below the header, there are buttons for 'Collapse All', 'Expand All', and '+ New'. The main area is titled 'Goal Tree' and shows a hierarchical list of goals for employee 'HR-EMP-00008'. The goals are categorized by cycle: '22-23'. The list includes:

- Redesign (Kristin Watson)** (Design):
  - Redesign Performance Module (Kristin Watson) (Design): **In Progress**
  - Redesign websites (Kristin Watson) (Design): **In Progress**
- Development (Kristin Watson)** (Development):
  - 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):
  - Bring down Github Issues by 20% (Kristin Watson) (Quality): **In Progress**
  - QA Testing (Kristin Watson) (Quality): **Completed**

On the right side of the list, there are progress indicators: '0 of 2 Completed' (for Redesign), '1 of 2 Completed' (for Development), and '1 of 2 Completed' (for Quality Improvement).

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



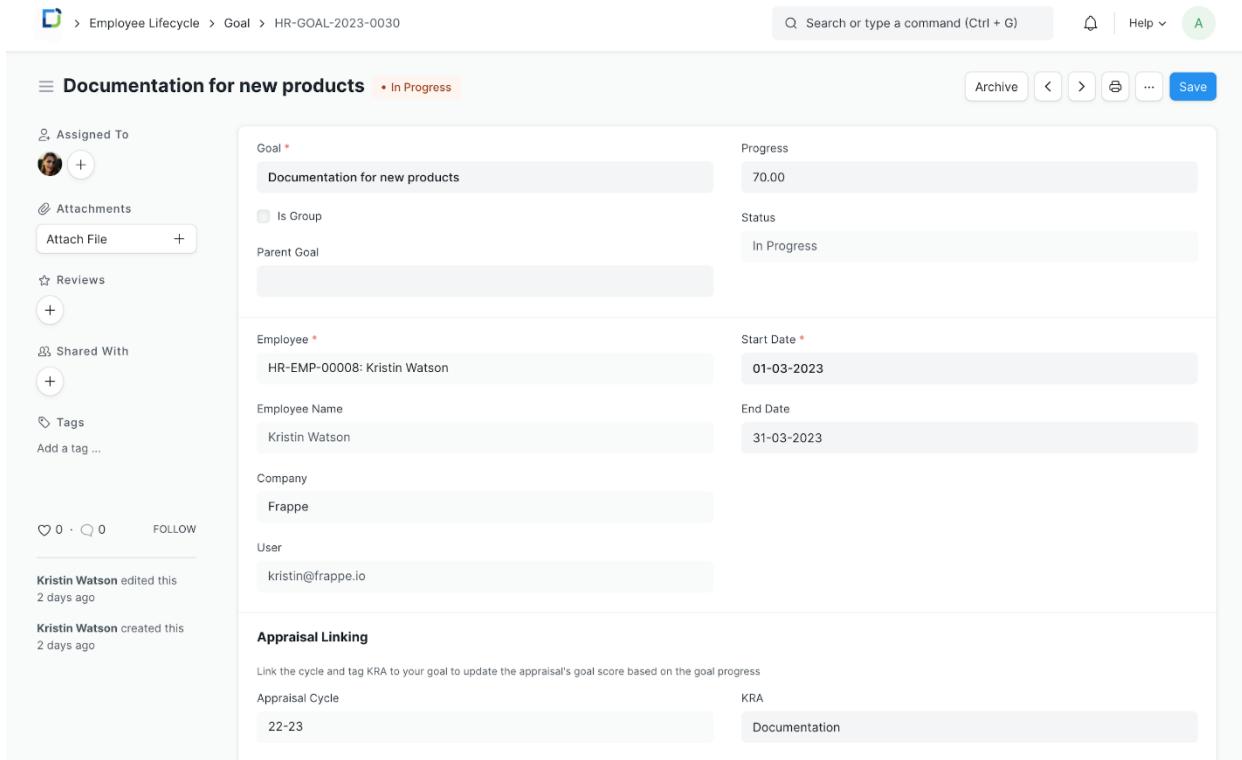
The screenshot shows the Frappe Goal Tree interface. At the top, there are search and command fields, a help icon, and a user profile. Below the header, there are buttons for 'Collapse All', 'Expand All', and '+ New'. The main area is titled 'Goal Tree' and shows a list of goals for an employee named 'HR-EMP-00008'. The goals are categorized by department: Design, Development, and Quality. Each goal has a status indicator (Completed, In Progress, or Pending) and a count of 0 or 1 of 2 goals completed. The interface is clean with a light gray background and white cards for each goal entry.

Category	Goal Name	Department	Status	Completed
HR-EMP-00008	Redesign (Kristin Watson)	Design	Completed	0 of 2 Completed
	Development (Kristin Watson)	Development	In Progress	1 of 2 Completed
	Recruitment Module (Kristin Watson)	Development	Pending	0 of 2 Pending
	Performance Improvements in Payroll (Kristin Watson)	Development	Completed	1 of 2 Completed
Quality Improvement (Kristin Watson)	Quality	Completed	1 of 2 Completed	

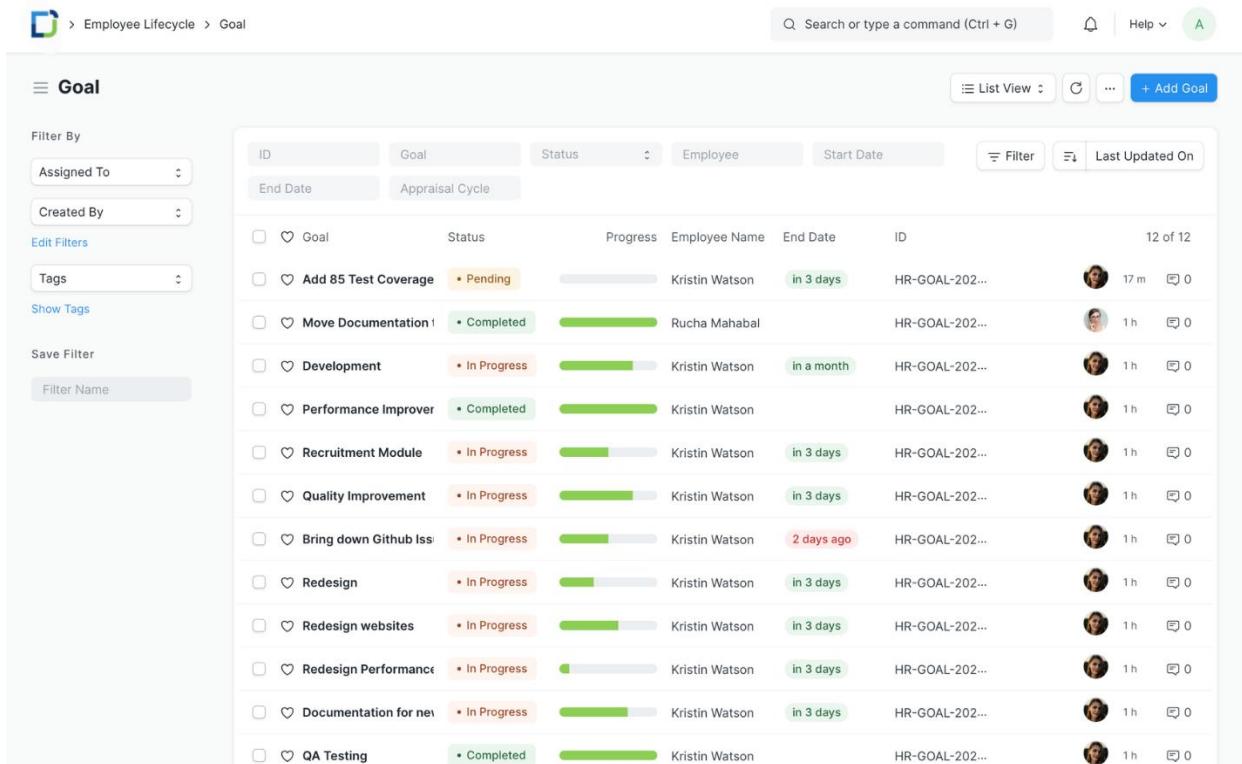
## 2.2 From the list view

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 coverage 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.



The screenshot shows the Frappe app interface for a goal titled "Documentation for new products". The goal is marked as "In Progress" with a progress bar at 70.00%. The goal is assigned to Kristin Watson, and the parent goal is also "In Progress". The goal is linked to an employee (HR-EMP-00008: Kristin Watson) with a start date of 01-03-2023 and an end date of 31-03-2023. The goal is associated with a company (Frappe) and a user (kristin@frappe.io). The "Appraisal Linking" section shows the goal is linked to an appraisal cycle (22-23) and a KRA (Documentation). The left sidebar shows various filters and tags for this goal.



The screenshot shows a list view of goals in the Frappe app. The table includes columns for ID, Goal, Status, Employee, Start Date, and ID. The list shows 12 of 12 goals. The goals listed are:

ID	Goal	Status	Employee	Start Date	ID
	Add 85 Test Coverage	Pending	Kristin Watson	in 3 days	HR-GOAL-202...
	Move Documentation	Completed	Rucha Mahabal		HR-GOAL-202...
	Development	In Progress	Kristin Watson	in a month	HR-GOAL-202...
	Performance Improver	Completed	Kristin Watson		HR-GOAL-202...
	Recruitment Module	In Progress	Kristin Watson	in 3 days	HR-GOAL-202...
	Quality Improvement	In Progress	Kristin Watson	in 3 days	HR-GOAL-202...
	Bring down Github Issues	In Progress	Kristin Watson	2 days ago	HR-GOAL-202...
	Redesign	In Progress	Kristin Watson	in 3 days	HR-GOAL-202...
	Redesign websites	In Progress	Kristin Watson	in 3 days	HR-GOAL-202...
	Redesign Performance	In Progress	Kristin Watson	in 3 days	HR-GOAL-202...
	Documentation for new products	In Progress	Kristin Watson	in 3 days	HR-GOAL-202...
	QA Testing	Completed	Kristin Watson		HR-GOAL-202...

The left sidebar includes filters for Assigned To, Created By, Tags, and a Save Filter button.

### 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)

```
parent (12.5%)
|_ child1 (0%)
|_ child2 (25%)
  |_ child3 (50%)
  |_ child4 (0%)
```

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.

Kristin Watson • Not Saved

View Goals ... Save

Assigned To +

Attachments +  
kristin.jpeg

Reviews +  
+100

Shared With +

Tags +  
Add a tag ...

0 · 2 FOLLOW

Kristin Watson edited this 59 minutes ago  
You created this 6 months ago

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

Search or type a command (Ctrl + G)

Help ... A

Overview KRAs Feedback Self Appraisal

Scores

Development: Maximum Score (30), Score Obtained (22)

Design: Maximum Score (30), Score Obtained (10)

Quality: Maximum Score (20), Score Obtained (15)

Documentation: Maximum Score (10), Score Obtained (5)

Automation: Maximum Score (10), Score Obtained (0)

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

## 3.2 Archive Goal

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.

The screenshot shows a software interface for managing employee goals. The top navigation bar includes 'Employee Lifecycle', 'Goal', and 'HR-GOAL-2023-0053'. The search bar says 'Search or type a command (Ctrl + G)'. The top right has 'Archive', 'Help', and a user icon. The main form is titled 'Add 85 Test Coverage' with a status of 'Pending'. It has sections for 'Assigned To' (with a placeholder for a user icon and a '+'), 'Attachments' (with a placeholder for 'Attach File' and a '+'), 'Reviews' (with a placeholder for '+'), 'Shared With' (with a placeholder for '+'), and 'Tags' (with a placeholder for 'Add a tag ...'). The goal details section includes 'Goal' (set to 'Add 85 Test Coverage'), 'Is Group' (unchecked), 'Parent Goal' (empty), 'Progress' (0.00), 'Status' (Pending), 'Employee' (HR-EMP-00008: Kristin Watson), 'Employee Name' (Kristin Watson), 'Start Date' (01-03-2023), and 'End Date' (31-03-2023). The bottom right of the form has buttons for 'Archive', 'Back', 'Forward', 'Print', '...', and 'Save'.

## 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

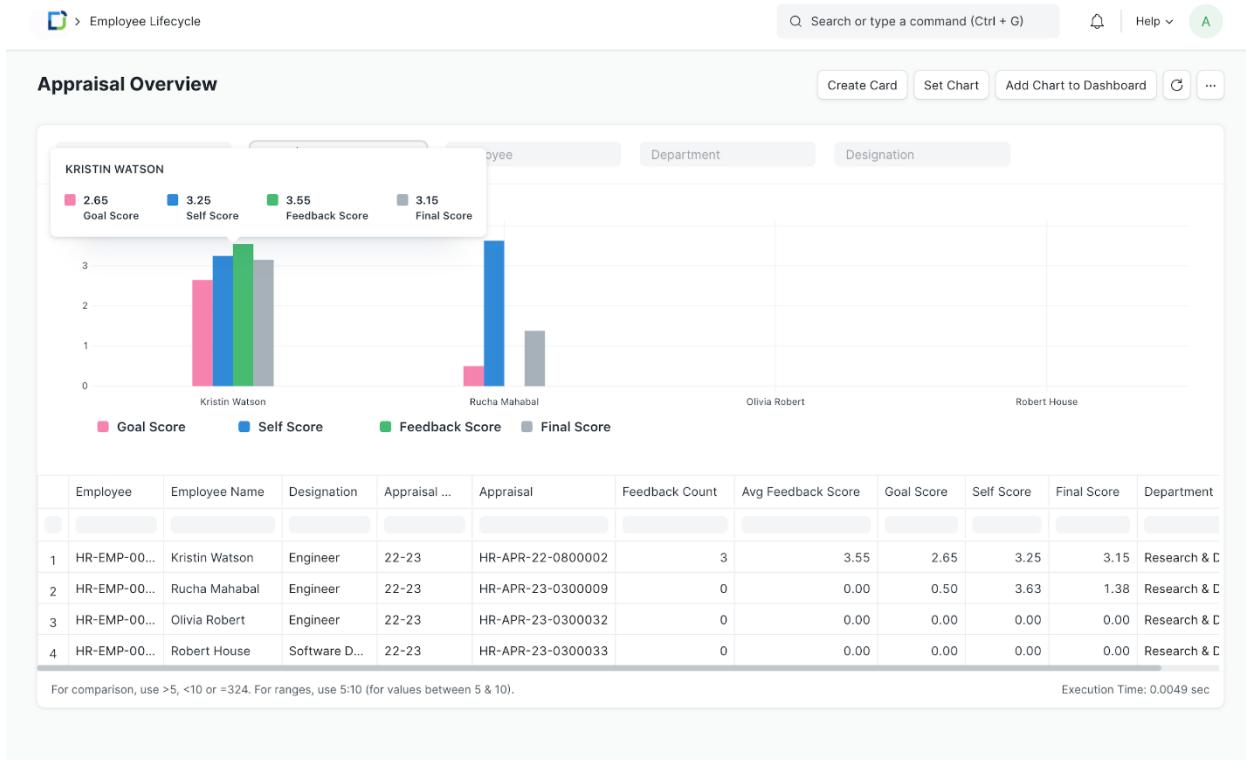
1. [Appraisal Cycle](#)
2. [Appraisal](#)

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

☰ Akash Unpaid

Assigned To + Connections ▾

Attachments + Employee \* Posting Date \*

Tags + HR-EMP-00001: Akash 20-02-2024

Share + Employee Name Company \*

Akash Akash Frappe

0 · 0 FOLLOW

You last edited this · just now

You created this · just now

Currency ▾

Purpose & Amount

Purpose \* Advance Amount \*

Travel ₹ 5,000.00

Paid Amount ₹ 0.00

Pending Amount ₹ 0.00

Claimed Amount ₹ 0.00

Returned Amount ₹ 0.00

Accounting

Advance Account \*  Repay Unclaimed Amount from Salary

Bank Account - F

Mode of Payment

Cash

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

[Connections](#) ▼

[Type of Payment](#)

Payment Type \* Pay

Posting Date \* 20-02-2024

Mode of Payment Cash

[Assigned To](#) +

[Attachments](#) +

[Tags](#) +

[Share](#) +

Heart 0 · Chat 0 · FOLLOW

You last edited this · just now

You created this · 2 minutes ago

[Payment From / To](#)

Party HR-EMP-00001

Party Name Akash

[Accounts](#) ▼

[Amount](#)

Paid Amount (INR) \* ₹ 5,000.00

[Reference](#)

Payment References

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

[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 | Save

Account	Bank Account No
Creditors - UP	
Account Balance	Party Type
₹ 7,900.00 Dr	Employee
	Party
	HR-EMP-00001
ACCOUNTING DIMENSIONS ▾	
AMOUNT	
Debit	Credit
5,000.00	
REFERENCE	
Reference Type	Is Advance
Employee Advance	Yes
Reference Name	User Remark
HR-EAD-2019-00002	
Reference Due Date	
Project	

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

**Cash - UP • Journal Entry**

Comments 0

Assigned To [Assign +](#)

Attachments [Attach File +](#)

Tags [Add a tag ...](#)

Reviews [+](#)

Shared With [+](#)

**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

You edited this a few seconds ago

You created this a few seconds ago

## 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.

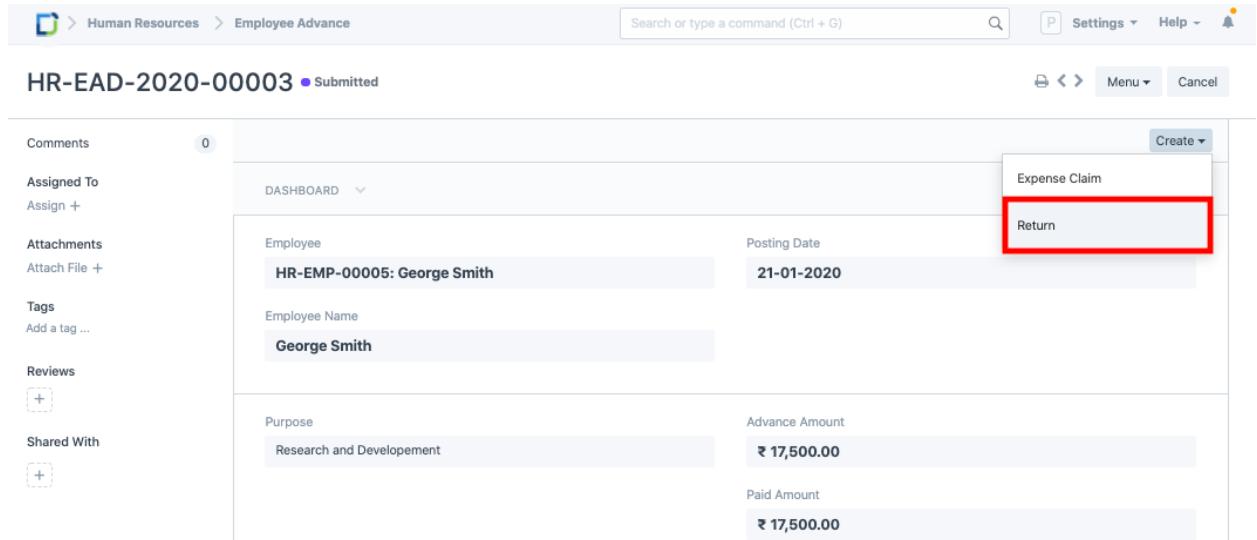
### 3.4 Return Amount

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



HR-EAD-2020-00003 • Submitted

Comments 0

Assigned To

Attachments

Tags

Reviews

Shared With

Employee HR-EMP-00005: George Smith

Employee Name George Smith

Posting Date 21-01-2020

Purpose Research and Developement

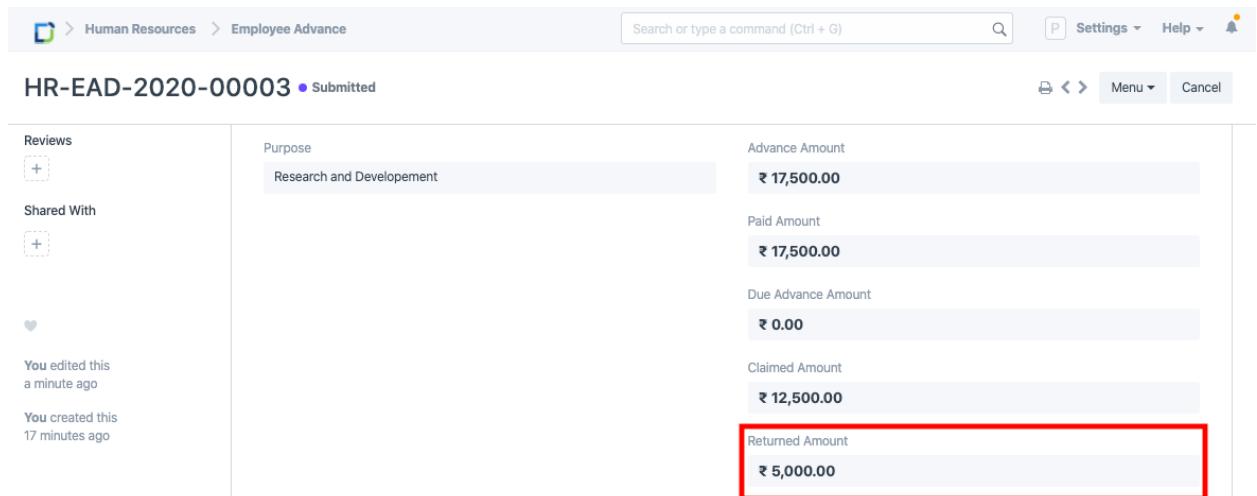
Advance Amount ₹ 17,500.00

Paid Amount ₹ 17,500.00

Expense Claim

Return

- 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.



HR-EAD-2020-00003 • Submitted

Reviews

Shared With

You edited this a minute ago

You created this 17 minutes ago

Purpose Research and Developement

Advance Amount ₹ 17,500.00

Paid Amount ₹ 17,500.00

Due Advance Amount ₹ 0.00

Claimed Amount ₹ 12,500.00

Returned Amount ₹ 5,000.00

## 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

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

**New Expense Claim** • Not Saved Save

Series *	Expense Approver
HR-EXP-.YYYY.-	bruce@erpnext.com
From Employee *	Approval Status
HR-EMP-00005	Approved
Employee Name	<input type="checkbox"/> Is Paid
Michelle D'souza	

Expenses						
<input type="checkbox"/> No.	Expense Date	Expense Claim Type	Description	Amount	Sanctioned Amount	<span>✓ Edit</span>
<input type="checkbox"/> 1	01-05-2021	Medical	medical expenses	1,000.00	1000	<span>✓ Edit</span>
<span>Add Row</span>						

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

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

**New Expense Claim** • Not Saved Save

Expenses						
<input type="checkbox"/> No.	Expense Date	Expense Claim Type	Description	Amount	Sanctioned Amount	<span>✓ Edit</span>
<input type="checkbox"/> 1	01-05-2021	Medical	medical expenses	₹ 1,000.00	₹ 1,000.00	<span>✓ Edit</span>
<span>Add Row</span>						

Expense Taxes and Charges						
<input type="checkbox"/> No.	Account Head	Rate	Amount	Total	<span>✓ Edit</span>	
<input type="checkbox"/> 1	CGST - UP	9	₹ 90.00	₹ 1,090.00	<span>✓ Edit</span>	
<input type="checkbox"/> 2	IGST - UP	→	18.000	180.00	1,180.00	<span>✓ Edit</span>
<span>Add Row</span>						

Total Sanctioned Amount	Grand Total
₹ 1,000.00	₹ 1,270.00
Total Taxes and Charges	Total Claimed Amount
₹ 270.00	₹ 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					

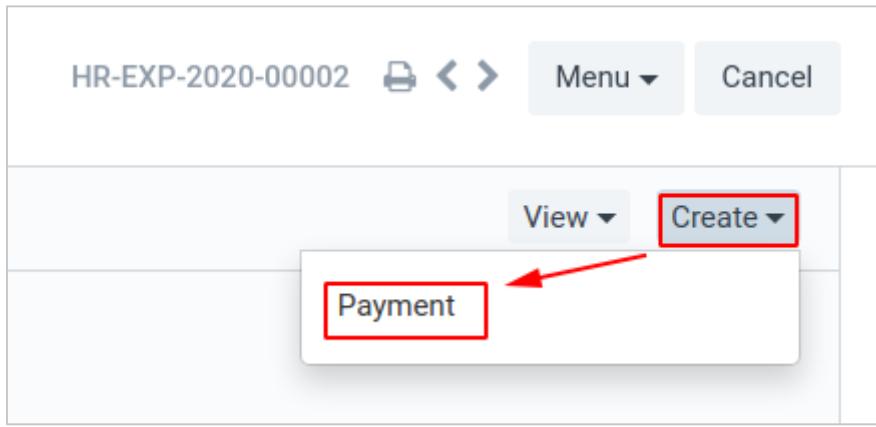
User can view unpaid expense claim using report "Unclaimed Expense Claims"

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

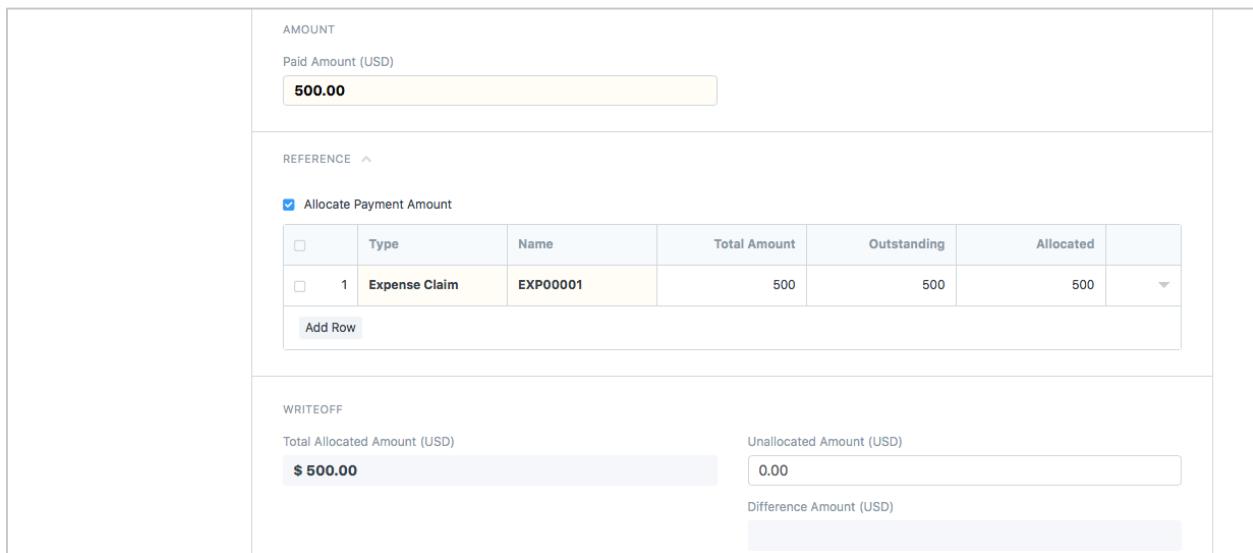
To make payment against the expense claim, user has to click on Create > Payment.

### Expense Claim



### Payment Entry

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



A screenshot of a 'Payment Entry' screen. The 'AMOUNT' section shows 'Paid Amount (USD)' as '\$ 500.00'. The 'REFERENCE' section has a checked checkbox for 'Allocate Payment Amount' and a table below it. The table has columns: Type, Name, Total Amount, Outstanding, Allocated. One row is shown: 'Expense Claim' and 'EXP00001' with values '500', '500', '500'. An 'Add Row' button is at the bottom of the table. The 'WRITEOFF' section shows 'Total Allocated Amount (USD)' as '\$ 500.00', 'Unallocated Amount (USD)' as '0.00', and 'Difference Amount (USD)' as '0.00'.

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

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 shows the 'New Expense Claim' screen in a software application. The top navigation bar includes a search bar, help, and a save button. The main form has the following fields:

- Total Sanctioned Amount: ₹ 270.00
- Total Claimed Amount: ₹ 270.00
- Posting Date: 10-05-2021
- Task: Design new sliding door wardrobe (linked to TASK-2021-00006)
- Remark: G
- 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

Design New Sliding Door Wardrobe • Not Saved

START AND END DATES

COSTING AND BILLING

Estimated Cost: 56,000.00

Total Sales Amount (via Sales Order):

Total Costing Amount (via Timesheets):

Total Billable Amount (via Timesheets):

Total Expense Claim (via Expense Claims): \$ 270.00

Total Billed Amount (via Sales Invoices):

Total Purchase Cost (via Purchase Invoice):

Total Consumed Material Cost (via Stock Entry):

Company: Woodcraft Decors

Default Cost Center:

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

Mohan Rai • Submitted

Assigned To

Attachments

Reviews

Shared With

Tags

Costing Details

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	Edit
1	Mumbai	Delhi	Flight	01-05-2023 20:30:00	<input type="button" value="Edit"/>
2	Delhi	Mumbai	Train	01-06-2023 20:30:00	<input type="button" value="Edit"/>

Costing

No.	Expense Type	Sponsored Amount	Funded Amount	Total Amount	Edit
1	Travel	₹ 5,000.00	₹ 5,000.00	₹ 5,000.00	<input type="button" value="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		 <a href="#">Insert Below</a> <a href="#">Insert Above</a> 
Travel From	Zurich	Departure Datetime
		25-10-2018 18:00:00
Travel To	Mumbai	Arrival Datetime
		26-07-2018 09:00:00
Mode of Travel	Flight	<input checked="" type="checkbox"/> Lodging Required
Meal Preference	Vegetarian	Preferred Area for Lodging
		Matunga
<input checked="" type="checkbox"/> Travel Advance Required		Check-in Date
Advance Amount	2000	26-10-2018
		Check-out Date
		28-10-2018
Other Details		
<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>		

# 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.

**Staffing Plan 2021-22** • Submitted

Company \* Unico Plastics Inc From Date \* 01-04-2021

Department Research & Development - UP To Date \* 31-03-2022

**Staffing Plan Details**

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

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
<b>Software Developer</b>	<b>0</b>
Vacancies	Current Openings
<b>5</b>	<b>0</b>
Estimated Cost Per Position	Number Of Positions
<b>₹ 1,00,000.00</b>	<b>5</b>
Total Estimated Cost	
<b>₹ 5,00,000.00</b>	

Esc - 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 ▾ | A

**Business Development Manager** • Open & Approved

Assigned To: 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 Mahabal | Designation: Engineer

**Timelines**

Posting Date \*: 12-09-2022 | Expected By: 31-10-2022

Actions: Create Job Opening, Associate Job Opening

ID	Designation	Requested By	Filter	Last Updated On
<input type="checkbox"/> <span>Designation</span>	Status	No. of Positions	Expected C.	Requested By
<input type="checkbox"/> <span>Accountant</span>	<span>Pending</span>	2	₹ 50,000.00	Rucha Maha... <span>in 17 days</span> HR-HIREQ-0...
<input type="checkbox"/> <span>Business Develop</span>	<span>Open &amp; ...</span>	5	₹ 5,00,000.00	Rucha Maha... <span>2 months ago</span> HR-HIREQ-0...
<input type="checkbox"/> <span>Head of Marketing</span>	<span>Open &amp; ...</span>	1	₹ 5,00,000.00	Rucha Maha... <span>2 months ago</span> HR-HIREQ-0...
<input type="checkbox"/> <span>Head of Marketing</span>	<span>Filled</span>	1	₹ 5,00,000.00	Rucha Maha... HR-HIREQ-0...
<input type="checkbox"/> <span>Business Develop</span>	<span>Filled</span>	2	₹ 5,00,000.00	Rucha Maha... HR-HIREQ-0...

## 3. Actions

### 3.1 Create Job Opening

Once the Job Requisition is Open & Approved, you can create a new Job Opening against the Job Requisition or associate an existing one.

### 3.2 Associate Job Opening

If you already have an existing Open Job Opening for that designation, you can associate it with the requisition. Once the Job Opening is closed, the Job Requisition's status is updated to Filled

## 4. Features

### 4.1 Check existing Employee Referrals

If there is an existing Employee Referral for that designation, you might want to consider referrals instead of creating new openings. A banner is visible on the Job Requisition form with the links to these employee referrals in these cases.

The screenshot shows the Frappe Job Requisition page for a 'Business Development Manager' position. The top navigation bar includes 'Employee Lifecycle > Job Requisition > HR-HIREQ-00003'. A search bar at the top right says 'Search or type a command (Ctrl + G)'. The main title is 'Business Development Manager • Open & Approved'. On the left, there are sidebar buttons for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews' (with a '+'), 'Shared With' (with a '+'), and 'Tags' (with a '+'). Below these are '0 Likes' and '0 Comments', and a 'FOLLOW' button. A note says 'You edited this 6 days ago' and 'Rucha Mahabal created this 4 months ago'. The main content area has tabs for 'Details', 'Job Description', and 'Connections'. The 'Details' tab shows the following data:

Designation *	Business Development Manager	No. of Positions *	5	Company *	Frappe
Department	Customer Service	Expected Compensation *	5,00,000.00	Status *	Open & Approved

The 'Requested By' section shows:

Requested By *	HR-EMP-00001	Department	Research & Development
Requested By (Name)	Rucha Mahabal	Designation	Engineer

The 'Timelines' section shows:

Posting Date *	12-09-2022	Expected By	31-10-2022
----------------	------------	-------------	------------

A red box highlights the message '1 Employee Referral open for this position.'

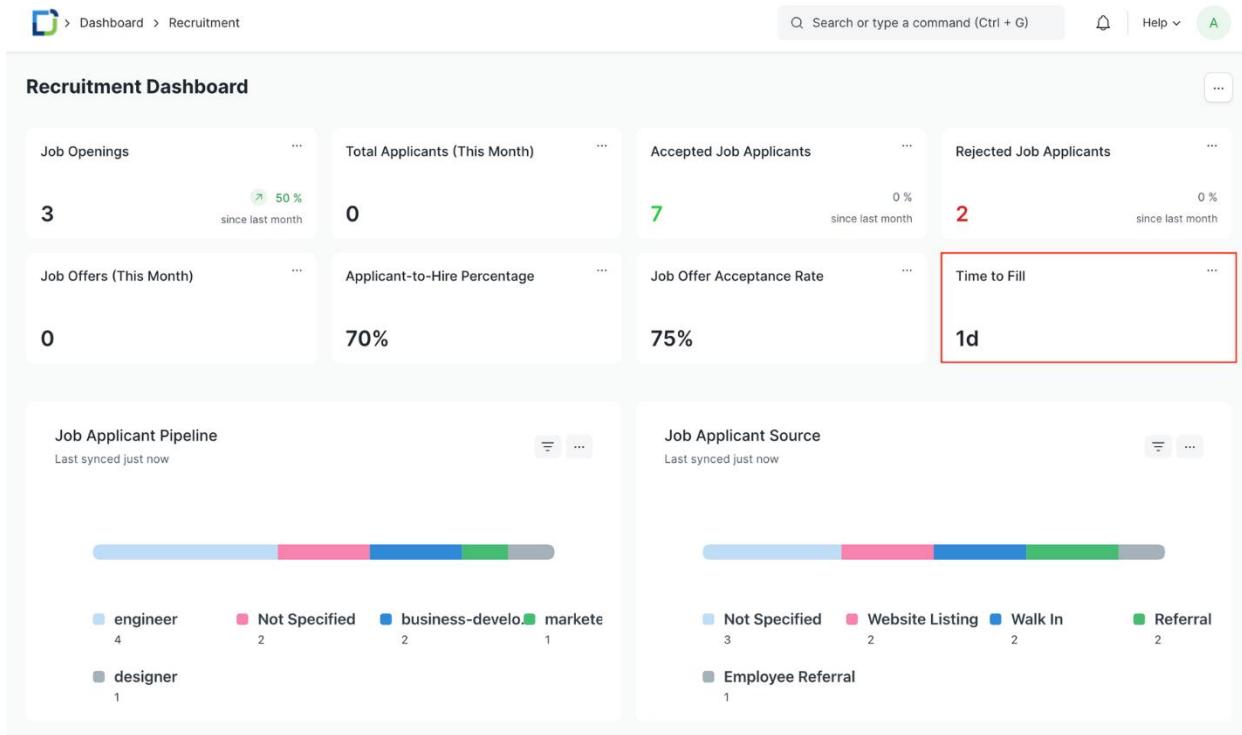
## 4.2 Get Job Requisitions in Staffing Plan

While creating a budget with the Staffing Plan, you can fetch the existing Pending or Open & Approved Job Requisitions.

## 4.3 Time to Fill Metric

Time to Fill measures the number of days it takes to fill an open position, from the date a job requisition is posted to the date when it is marked as Filled. This metric is auto-calculated and set in Job Requisition.

The Average Time to Fill is also displayed on the Hiring Dashboard:



## 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

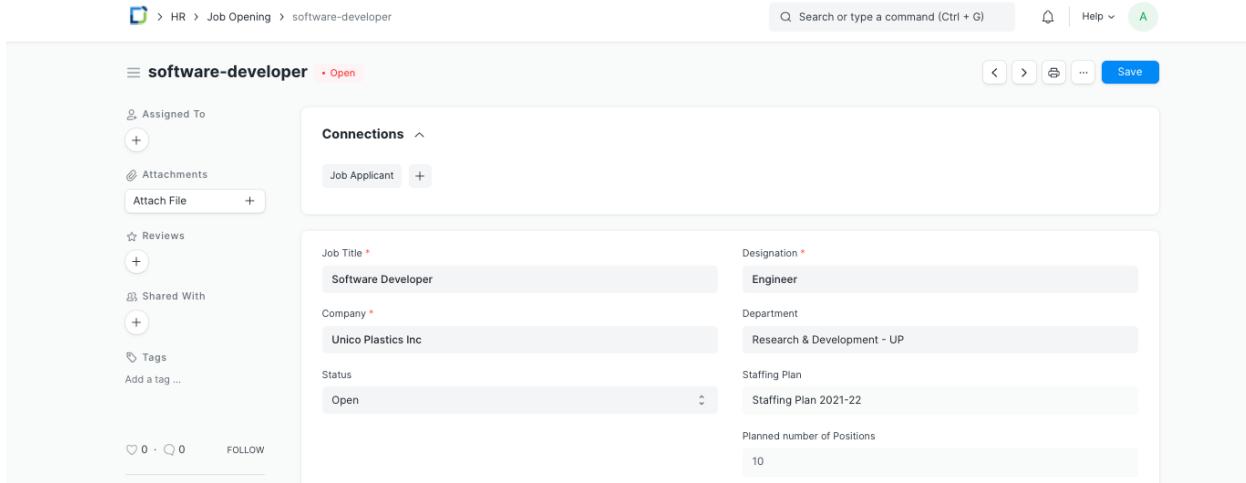
## 1. Prerequisites

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.



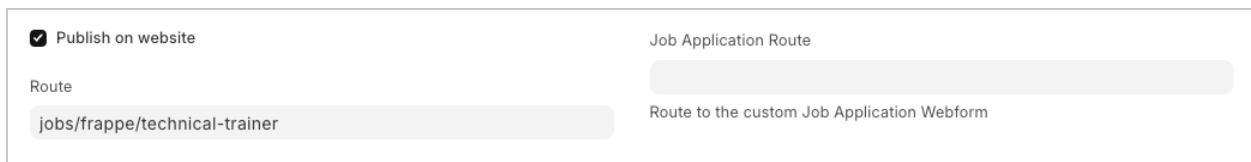
Once the Job Opening is saved, you can directly create a new Job Applicant from the dashboard.

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.



## 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 Search for Jobs Posting Date

**Company** Showing 5 results

Frappe

**Department**

Marketing

Purchase

Research & Development

Sales

**Location**

Amsterdam, Netherlands

Los Angeles, CA

Remote

Remote - United States

**Employment Type**

Contract

Full-time

Intern

**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

**Frappe** · 1 hour ago

Location MumbaiDepartment Human ResourcesSalary Range ₹ 8,00,000 - ₹ 12,00,000 / year

Employment Type Full-timeApplications Received 1Closes 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](#), [Frappe UI](#) 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

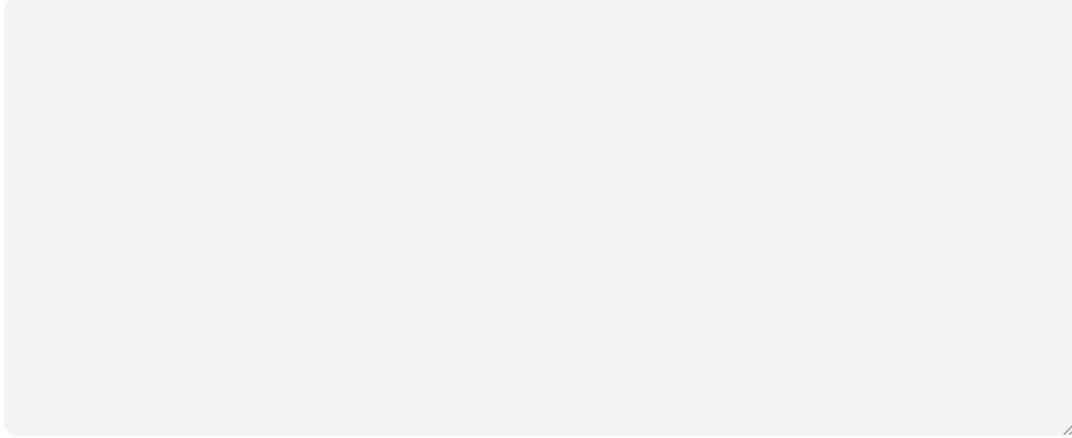
Phone Number

+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

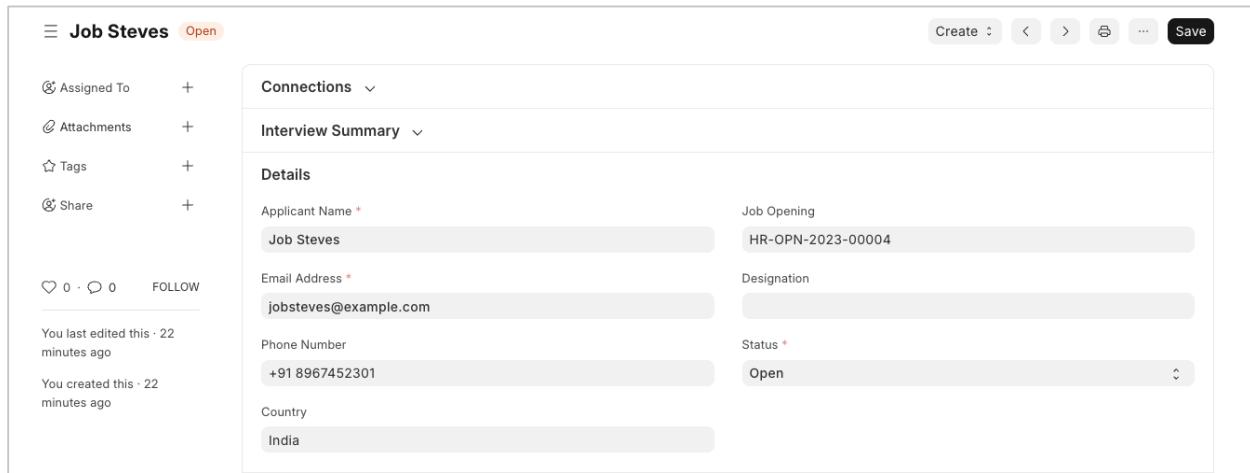
Upper Range

<input type="text"/>	0.00	<input type="text"/>	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 the 'Job Steves' record in the DellSuite HR system. The left sidebar contains links for Assigned To, Attachments, Tags, and Share, along with a FOLLOW button and a note about the last edit. The main area is titled 'Connections' and shows an 'Interview Summary' section. The 'Details' section contains the following fields with their values:

Field	Value
Applicant Name *	Job Steves
Job Opening	HR-OPN-2023-00004
Email Address *	jobsteves@example.com
Designation	(empty)
Phone Number	+91 8967452301
Status *	Open
Country	India

## 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

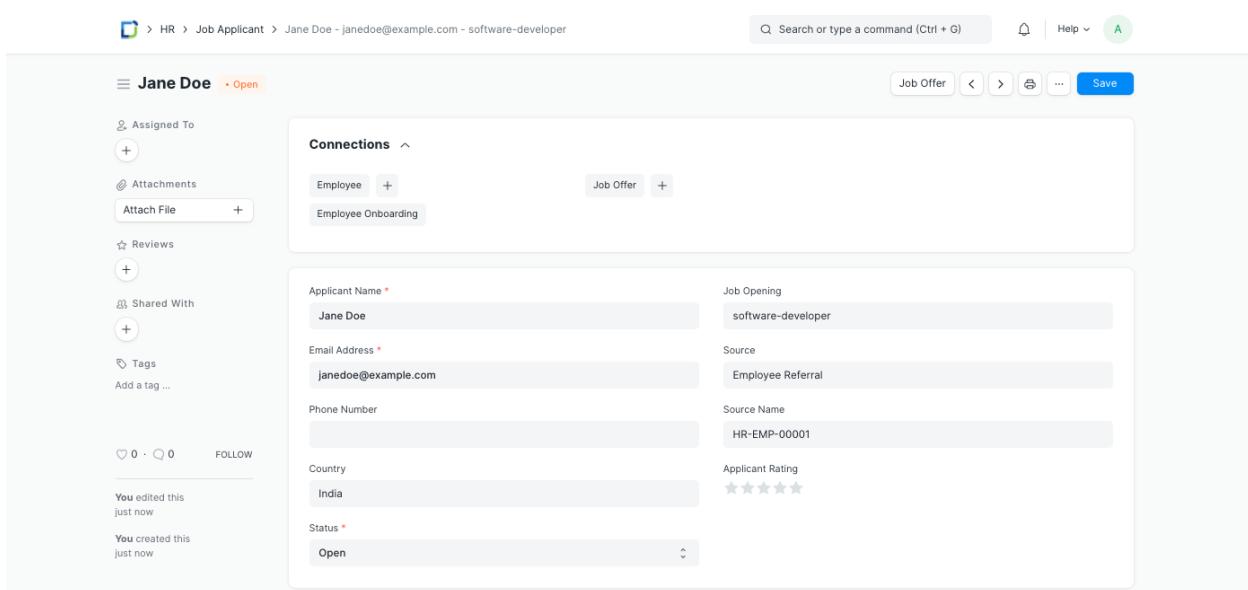
Before creating a Job Applicant, it is advisable you create the following:

- 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 the 'Job Applicant' creation screen. The top navigation bar includes 'Search or type a command (Ctrl + G)', a bell icon, 'Help', and a user profile. The main area is titled 'Jane Doe' with an 'Open' button. On the left, there are sections for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews', 'Shared With', and 'Tags'. The right side contains a 'Connections' section with 'Employee' and 'Job Offer' buttons, and a main form with the following fields:  
- Applicant Name: Jane Doe  
- Job Opening: software-developer  
- Email Address: janedoe@example.com  
- Source: Employee Referral  
- Phone Number (empty)  
- Source Name: HR-EMP-00001  
- Country: India  
- Applicant Rating: ★★★★  
- Status: Open

## 3. Features

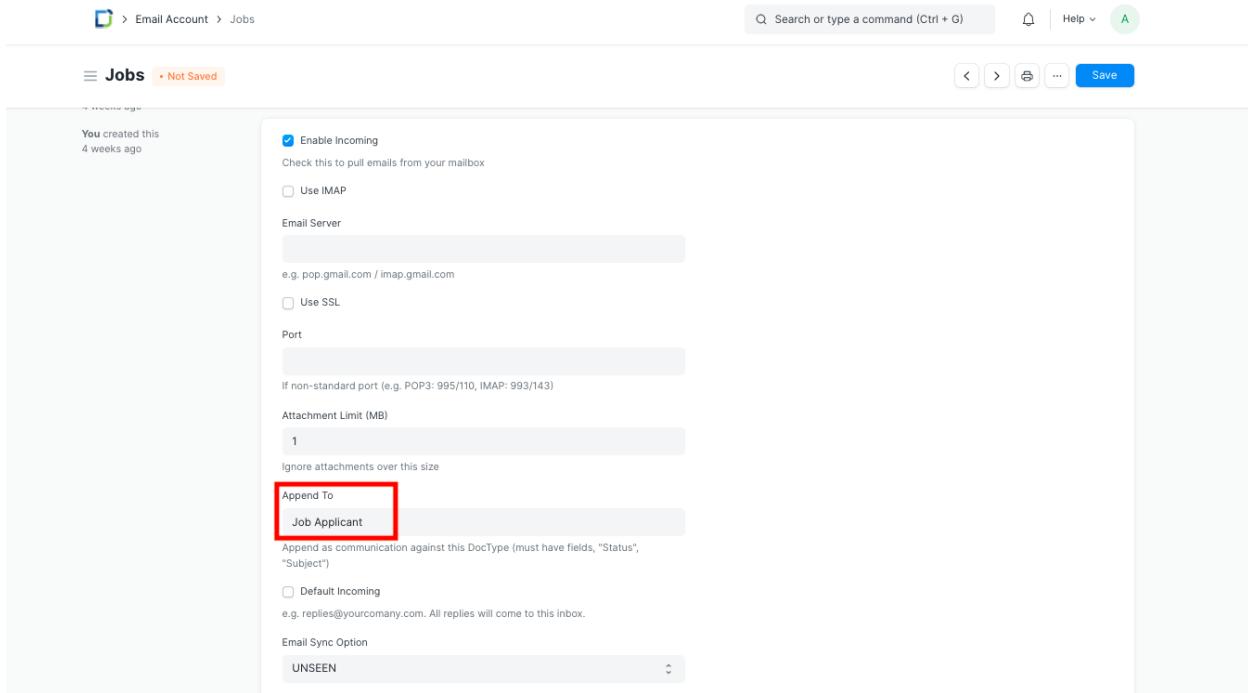
### 3.1 Linking with an Email Account

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'



## 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.

Connections

Interview	Interview Round	Status	Expected Rating	Rating
HR-INT-2021-0009	HR Interview	Cleared	★★★★★	★★★★★
HR-INT-2021-0008	Technical Interview	Cleared	★★★★★	★★★★★

Details

Applicant Name *	Job Opening
Anne Frank	
Email Address *	Designation
anne@gmail.com	Engineer

## 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.

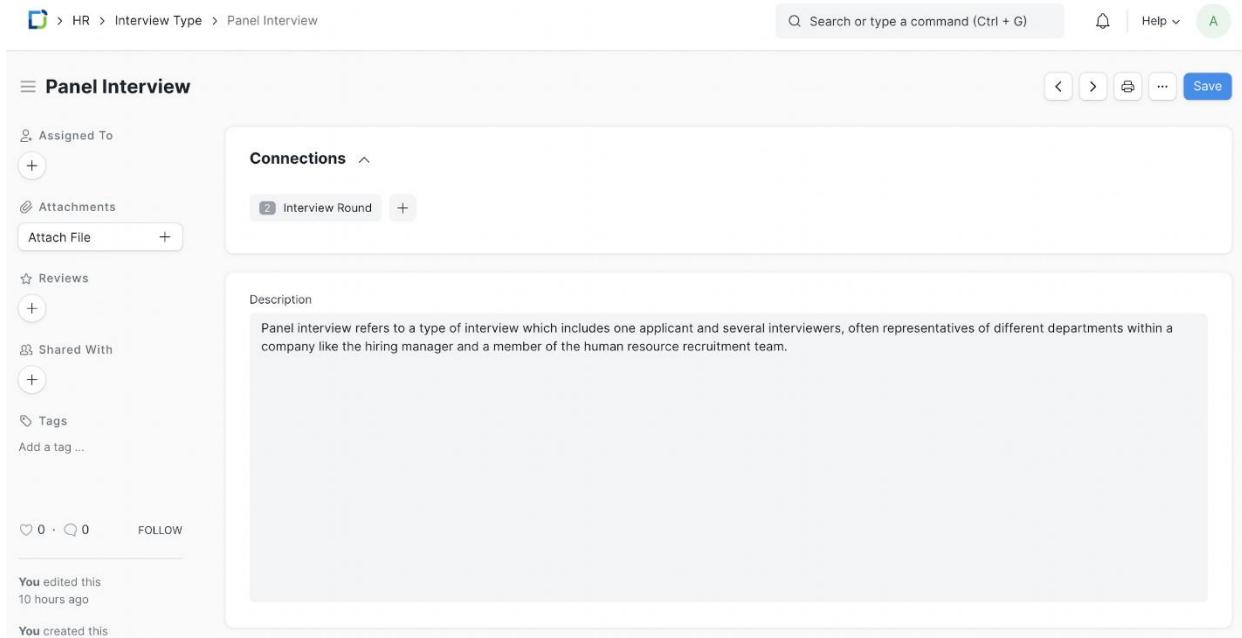
Interview Types can be used to specify the type of interview for a particular Interview Round.

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 the 'Panel Interview' creation page in a software application. The top navigation bar includes 'Search or type a command (Ctrl + G)', 'Help', and a user icon. The main interface has a left sidebar with 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews', 'Shared With', and 'Tags' (with a 'Add a tag ...' button). The right side features a 'Connections' section with a 'Interview Round' dropdown and a '+' button. Below this is a 'Description' field 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 are '0' likes and '0' comments, and a 'FOLLOW' button. A note at the bottom left says 'You edited this 10 hours ago'. The bottom right shows 'You created this'.

## 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.

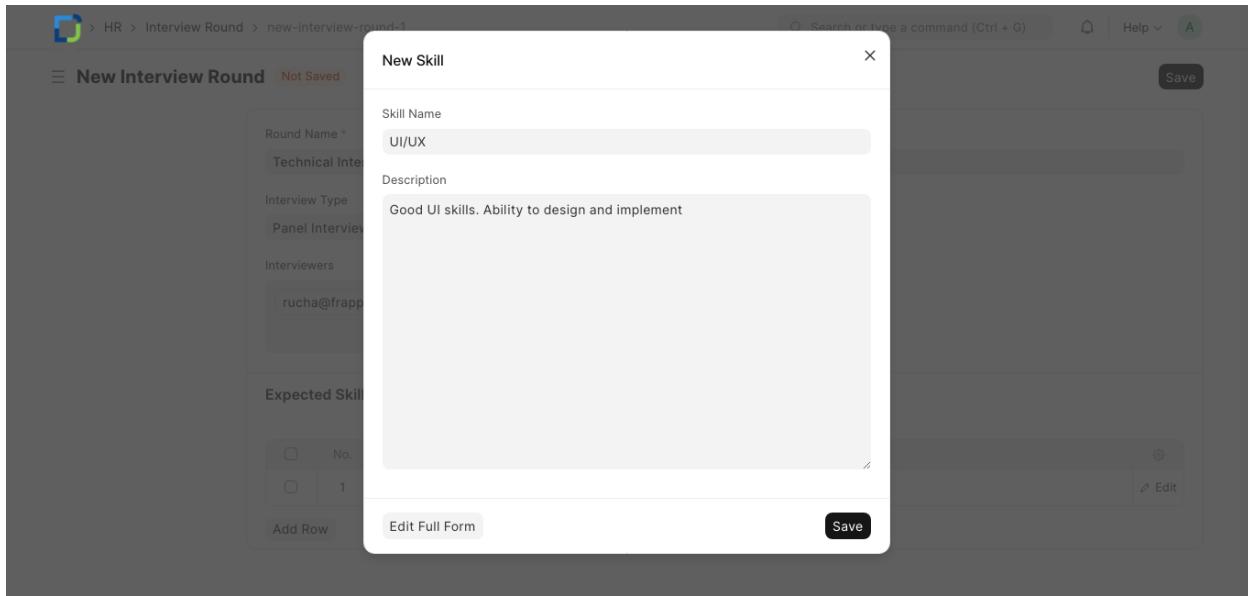
The Interview Round doctype enables you to define and set up these rounds for future [Interviews](#).

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

No.	Skill	Description	Edit
1	UI/UX	Good UI skills. Ability to design and implement	<input type="button" value="Edit"/>
2	Backend	Good backend knowledge, APIs	<input type="button" value="Edit"/>
3	Code Quality	Clean code formatting, semantics and structure, error handling, sm...	<input type="button" value="Edit"/>

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.

ron@gmail.com Pending

Assigned To

Submit this document to confirm

Details Feedback

Connections

Details

Interview Round \* Status \*

Technical Round Pending

Job Applicant \* Scheduled On \*

ron@gmail.com 28-09-2023

Job Opening From Time \*

product-engineer 11:00:00

Designation To Time \*

Engineer 12:00:00

Resume link

<https://puginarug.com/>

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.

Search or type a command (Ctrl + G)

Filter Last Modified On Calendar View ... + Add Interview

Tags Show Tags Save Filter Filter Name Show Saved

HR-INT-2021-0010 Olivia House - olivia@ Technical Interview 1p - 2p

HR-INT-2021-0012 Robert House - rober HR Interview 9a - 9:30a

HR-INT-2021-0011 Robert House - rober Technical Interview 10a - 11a

HR-INT-2021-0008 Anne Frank - anne@ Technical Interview 3p - 4p

HR-INT-2021-0009 Anne Frank - anne@ HR Interview 5p - 5:30p

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

Hide Weekends

## 3.2 Interview Feedback

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.

ron@gmail.com Pending

Assigned To: [Add Assignee](#)

Attachments: [Add File](#)

Tags: [Add Tags](#)

Shared With: [Invite](#)

0 likes, 0 comments, FOLLOW

You last edited this 2 minutes ago

You created this 2 weeks ago

Overall Average Rating: 3.75 (based on 3 reviews)

Feedback Summary: Average rating of demonstrated skills

Skill	Average Rating
HTML/CSS	4.33
JavaScript	3.83
Python	3.67
SQL	2.83
Problem-solving	4

**Akash Tom** (HR Manager) 4 minutes ago

HR Manager

★ ★ ★ ★ ★ (3.9)

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

Submitted

Assigned To [Add Assignee](#)

Interview \* **HR-INT-2023-0001**

Interviewer \* [Add User](#)

Interview Round \* **Technical Round**

Result \* **Cleared**

Job Applicant [Edit](#) [View Profile](#) [Email](#) [Share](#)

ron@gmail.com

Details

Skill Assessment

No.	Skill *	Rating *	Actions
1	Python	★★★★★	<a href="#">Edit</a>
2	JavaScript	★★★★★	<a href="#">Edit</a>
3	SQL	★★★★★	<a href="#">Edit</a>
4	HTML/CSS	★★★★★	<a href="#">Edit</a>
5	Problem-solving	★★★★★	<a href="#">Edit</a>

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.

The screenshot shows a software interface for managing job offers. The main area is titled 'Jane Doe - Awaiting Response'. It contains a 'Job Applicant' section with fields for Name (Jane Doe), Email (janedoe@example.com), and Designation (Software Developer). The 'Status' is set to 'Awaiting Response' and the 'Offer Date' is 01-05-2021. Below this is a 'Job Offer Terms' section with a table:

No.	Offer Term	Value / Description
1	Job Description	to create software applications

At the bottom of the main window, there is a 'Select Terms and Conditions' section with a link to 'Terms & conditions 2021'. The sidebar on the left includes sections for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews', 'Shared With', and 'Tags' (with a 'Add a tag ...' button). There are also 'Follow' and 'Edit' buttons.

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

## 3. Features

### 3.1 Job Offer Terms

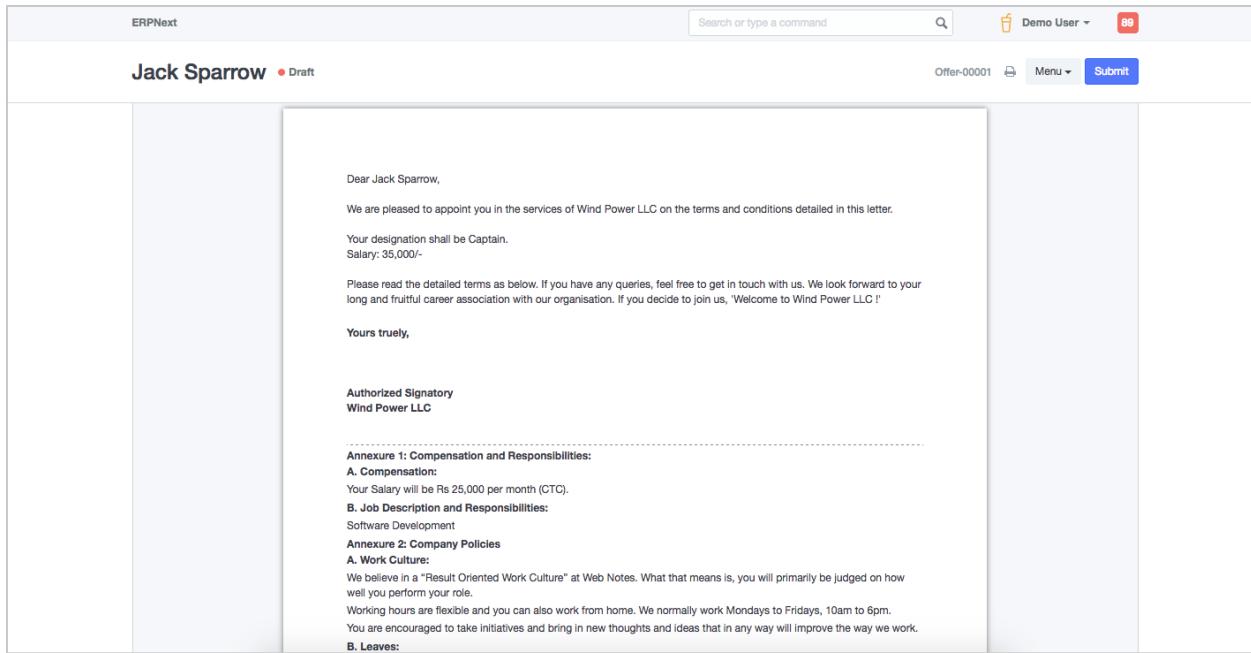
In this section, you can enter the Job Offer Term such as job description, notice period, incentives, leaves per year, etc. and specify its Value/ Description.

### 3.2 Select Terms and Conditions

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

### 3.3 Printing Details

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



## 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 *	Company *
Jane Doe - janedoe@example.com - software-developer	Unico Plastics Inc
Applicant Name *	Appointment Date *
Jane Doe	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

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

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	Edit
<input type="checkbox"/>	1	Location	Your primary place of posting will be Mumbai	Edit
<input type="checkbox"/>	2	Effective Date	your appointment will be effective from 2nd May2021	Edit
<input type="checkbox"/>	3	Probation	You will be on probation for the first 3 months	Edit
<input type="checkbox"/>	4	Working hours	Your working hours will be Monday to Friday, 10:00 am - 6:00 pm	Edit
<input type="checkbox"/>	5	Compensation	Your compensation package will be Rs. 500,000 / P.A	Edit
<input type="checkbox"/>	6	Leave Entitlement	You will be entitled to 30 Annual Leaves	Edit

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.

Connections

First Name *	Date *
Anushka	29-08-2022
Last Name *	Status *
B	Pending
Full Name	For Designation *
Anushka B	Business Development Manager

Referral Details

Email *	anushka@gmail.com
Contact No.	9878678909

Referrer Details

Referrer *	<input checked="" type="checkbox"/> Is Applicable for Referral Bonus
HR-EMP-00001	Referral Bonus Payment Status
Referrer Name	Unpaid
Rucha Mahabal	

### 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-REF-0030 • Pending

Connections

First Name *	Date *
James	26-04-2021
Last Name *	Status *
charlie	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-REF-0028 • Accepted

Referrer Details

Employee *	<input checked="" type="checkbox"/> Is applicable for referral Bonus
HR-EMP-00002: Gavin	Department
Employee Name	Accounts - F
Gavin	

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 *	Company *
HR-ADS-YY.-MM.-	frappe
Employee *	Currency *
HR-EMP-00002	INR
Salary Component *	Payroll Date *
Incentive	27-04-2021
Salary Component Type	Date on which this component is applied
Earning	<input type="checkbox"/> Is Recurring
Amount *	<input type="checkbox"/> Overwrite Salary Structure Amount
10,000.00	<input type="checkbox"/> Deduct Full Tax on Selected Payroll Date
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).

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.

Search or type a command (Ctrl + G)

Training Result Training Feedback < > ⌂ ⌂ ... Cancel

Event Status \* Scheduled

Type \* Seminar

Has Certificate

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"/> Edit
<input type="checkbox"/> 1	HR-EMP-00001	Open	Mandatory	<input type="checkbox"/> Edit
<input type="checkbox"/> 2	HR-EMP-00002	Open	Mandatory	<input type="checkbox"/> Edit
<input type="checkbox"/> 3	HR-EMP-00003	Open	Mandatory	<input type="checkbox"/> Edit

Add Multiple Add Row

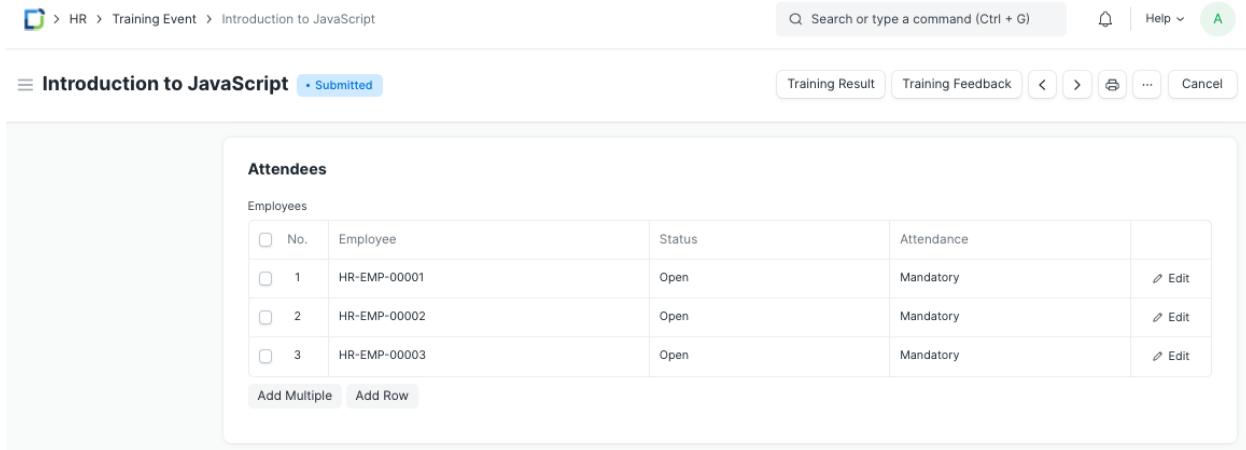
Note: Check the 'Has Certificate' checkbox if the Training Event is a certified course.

## 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'.



The screenshot shows the 'Attendees' section of a 'Training Event' titled 'Introduction to JavaScript'. The event is marked as 'Submitted'. The attendees table has the following data:

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

Buttons at the bottom of the table include 'Add Multiple' and '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

No.	Employee	Hours	Grade	Comments	Edit
1	HR-EMP-00001	2	A	Excellent	<input type="button" value="Edit"/>
2	HR-EMP-00005	2	B	Fair	<input type="button" value="Edit"/>
3	HR-EMP-00003	0	A	Excellent	<input type="button" value="Edit"/>

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.

The screenshot shows a software interface for managing training feedback. The top navigation bar includes a logo, the path 'HR > Training Feedback > HR-TRF-2021-00001', a search bar, and a help menu. The main content area is titled 'Albert Einstein' with a status of 'Submitted'. On the left, there are sidebar buttons for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews' (with a plus sign), 'Shared With' (with a plus sign), and 'Tags' (with a plus sign). The main form fields are: 'Employee \*' (HR-EMP-00001), 'Training Event \*' (Introduction to JavaScript), 'Employee Name' (Albert Einstein), 'Event Name' (Introduction to JavaScript), 'Department' (Research & Development - UP), and 'Feedback \*' (a list including '- Topics were explained clearly', '- Practicals were well planned', and '- Overall good'). At the bottom left are '0 likes' and '0 comments' buttons, and a 'FOLLOW' button.

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.

The screenshot shows the Odoo Employee Onboarding module. The top navigation bar includes a search bar, a help icon, and a user profile icon. The main content area is titled 'Jane Doe' with a status of 'Pending'. On the left, there are sidebar buttons for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews' (with a '+'), 'Shared With' (with a '+'), and 'Tags' (with 'Add a tag ...'). Below these are icons for '0' likes and '0' comments, and a 'FOLLOW' button. The main form area contains the following data:

Job Applicant *	Jane Doe - janedoe@example.com - software-developer	Employee Onboarding Template	HR-EMP-ONT-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
<input type="checkbox"/> Notify users by email		Project	PROJ-0001

At the bottom left, it says 'You edited this 4 days ago'.

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.

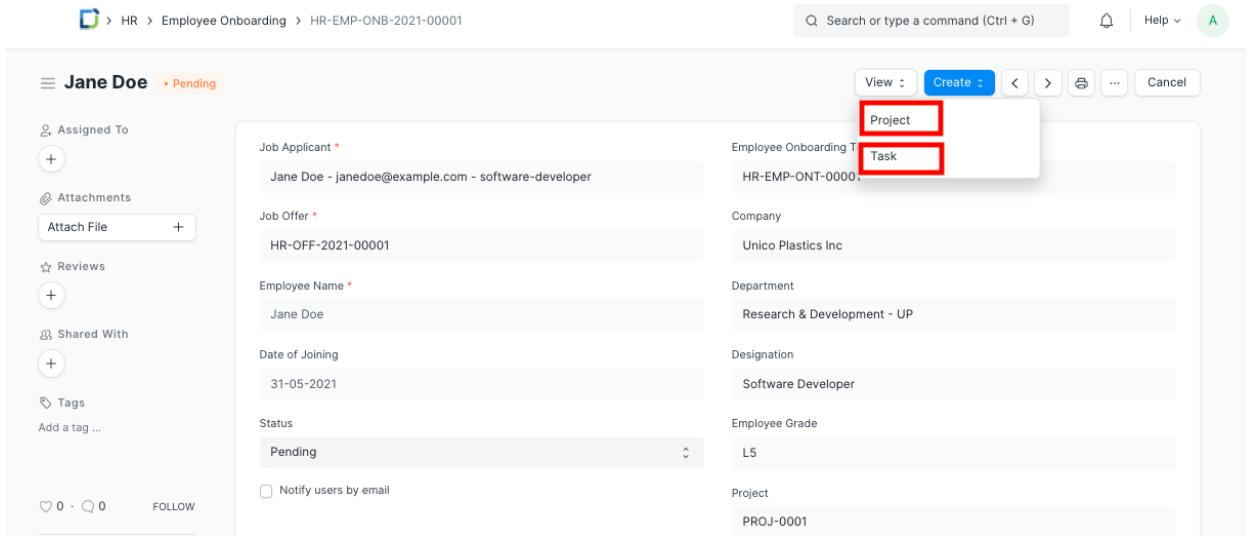
No.	Activity Name	User	Role	Begin On (Days)	Duration (Days)	Edit
1	Laptop Assignment	reema@erpnext.com	HR Mana...	1	1	
2	Introduction to the company	reema@erpnext.com	HR Mana...	1	1	
3	Explain coding standards	floyd@erpnext.com	Employee	1	1	
4	Training Kickoff	floyd@erpnext.com	Employee	2	30	

 There is also a 'Add Row' button at the bottom of the table."/>

## 3.2 Tasks and Assignments

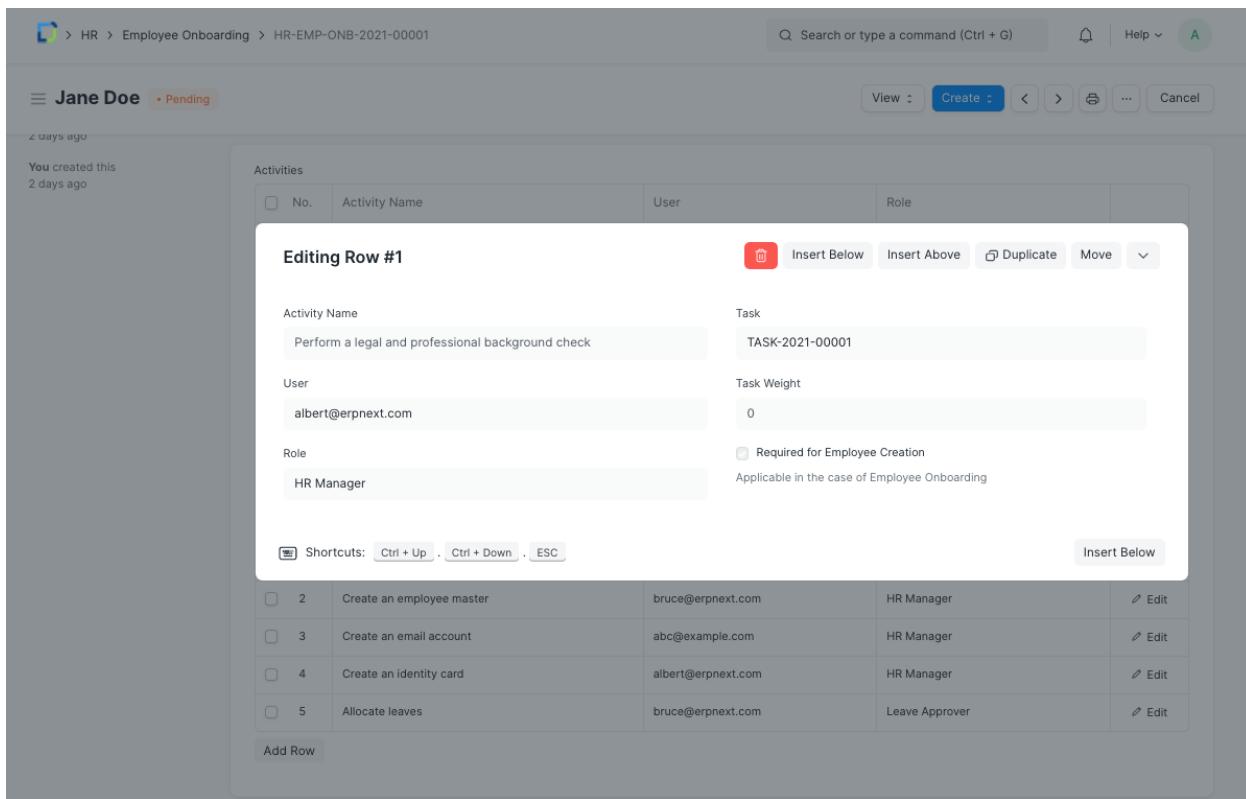
On submission of the Employee Onboarding, a Project will be created. Within the Project, Tasks will also be created for each Activity. If you have set the date and duration against activities, tasks will be created with appropriate Start and End Date excluding holidays.

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



The screenshot shows the Employee Onboarding module for an employee named Jane Doe. The 'Project' and 'Task' buttons in the top right corner of the form are highlighted with red boxes. The form contains fields for Job Applicant, Job Offer, Employee Name, Date of Joining, Status, and various project and task details.

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



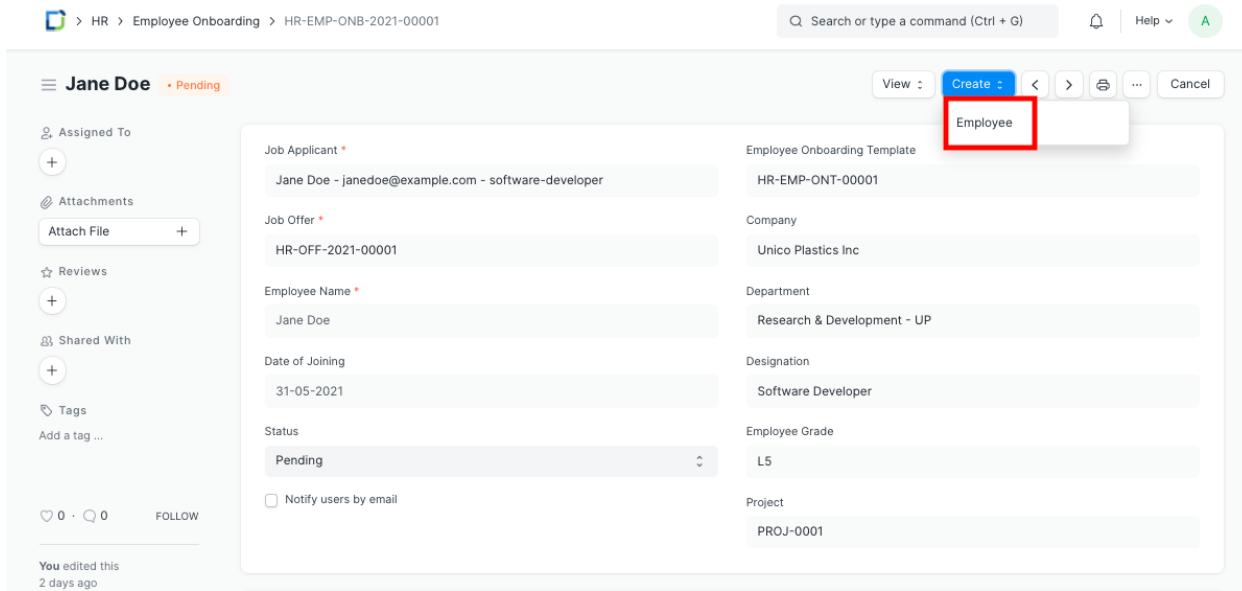
The screenshot shows the 'Activities' section of the Employee Onboarding module. A row is being edited, with the 'Activity Name' field containing 'Perform a legal and professional background check' and the 'Task' field containing 'TASK-2021-00001'. The 'Task Weight' is set to 0. A note indicates that this is 'Required for Employee Creation' and 'Applicable in the case of Employee Onboarding'. The table below shows other activity rows.

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

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 Employee Onboarding. The top navigation bar includes 'Search or type a command (Ctrl + G)', 'Help', and a user profile icon. The main content area shows a list of employees with a red box highlighting 'Jane Doe'. The right side displays a detailed view of 'Jane Doe' with a red box around the 'Create' button. The 'Create' button has a dropdown menu with the option 'Employee' selected. The employee details shown include: Job Applicant (Jane Doe - janedoe@example.com - software-developer), Employee Onboarding Template (HR-EMP-ONT-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), Notify users by email (unchecked), Project (PROJ-0001).

## 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:

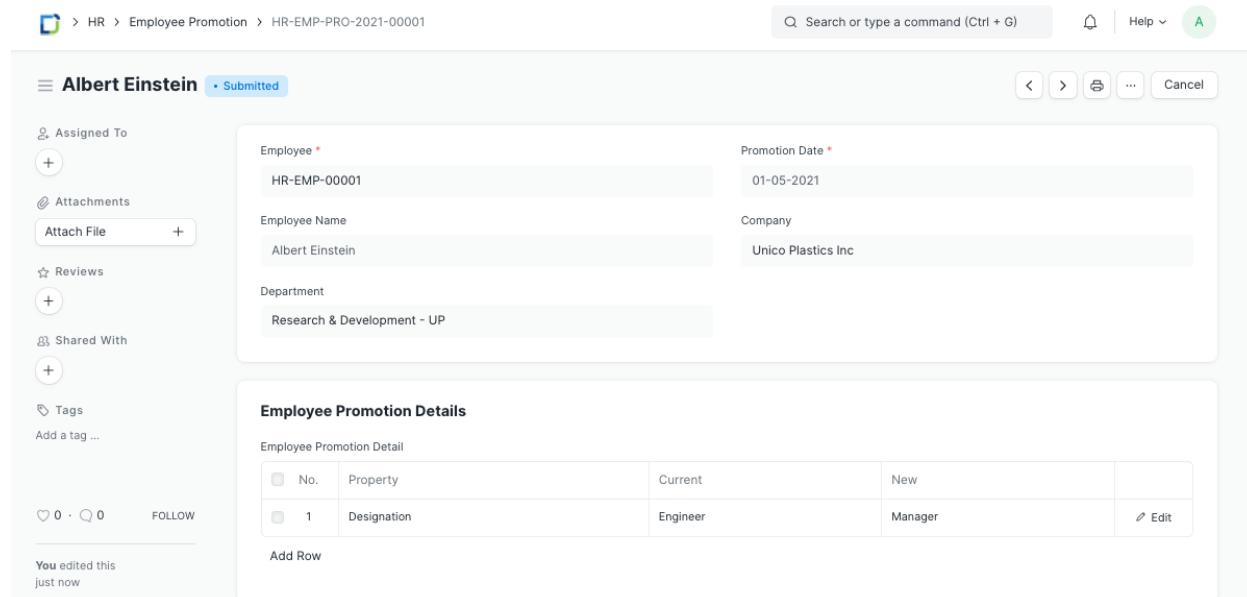
## 1. Prerequisites

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.



The screenshot shows the 'Employee Promotion' creation screen. At the top, the navigation path is 'HR > Employee Promotion > HR-EMP-PRO-2021-00001'. The search bar says 'Search or type a command (Ctrl + G)'. On the right, there are buttons for 'Help', 'Cancel', and a green 'A' icon.

The main area is titled 'Albert Einstein' with a 'Submitted' status. On the left, there are sidebar buttons for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews' (with an 'Add' button), 'Shared With' (with an 'Add' button), and 'Tags' (with an 'Add a tag ...' button). Below these is a 'FOLLOW' button.

The main form fields are:

- Employee \***: HR-EMP-00001
- Promotion Date \***: 01-05-2021
- Employee Name**: Albert Einstein
- Company**: Unico Plastics Inc
- Department**: Research & Development - UP

Below this is a section titled 'Employee Promotion Details' with a table:

No.	Property	Current	New	Edit
1	Designation	Engineer	Manager	

At the bottom of the table section is a 'Add Row' button.

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.

Employee Separation Template

Employee Separation Template

Employee Name

Resignation Letter Date

Status

Employee Grade

Activities

No.	Activity Name	User	Role	Edit
1	Collect laptop	bruce@erpnext.com	HR User	<a href="#">Edit</a>
2	Clear dues	michelle@erpnext.com	HR Manager	<a href="#">Edit</a>
3	Delete employee email account	bruce@erpnext.com	HR Manager	<a href="#">Edit</a>
4	Collect identity card	michelle@erpnext.com	HR User	<a href="#">Edit</a>

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.

No.	Activity Name	User	Begin On (Days)	Duration (Days)	Edit
1	Take Exit Interview	reema@erpnext.com	1	1	
2	Collect Laptop	reema@erpnext.com	2	1	

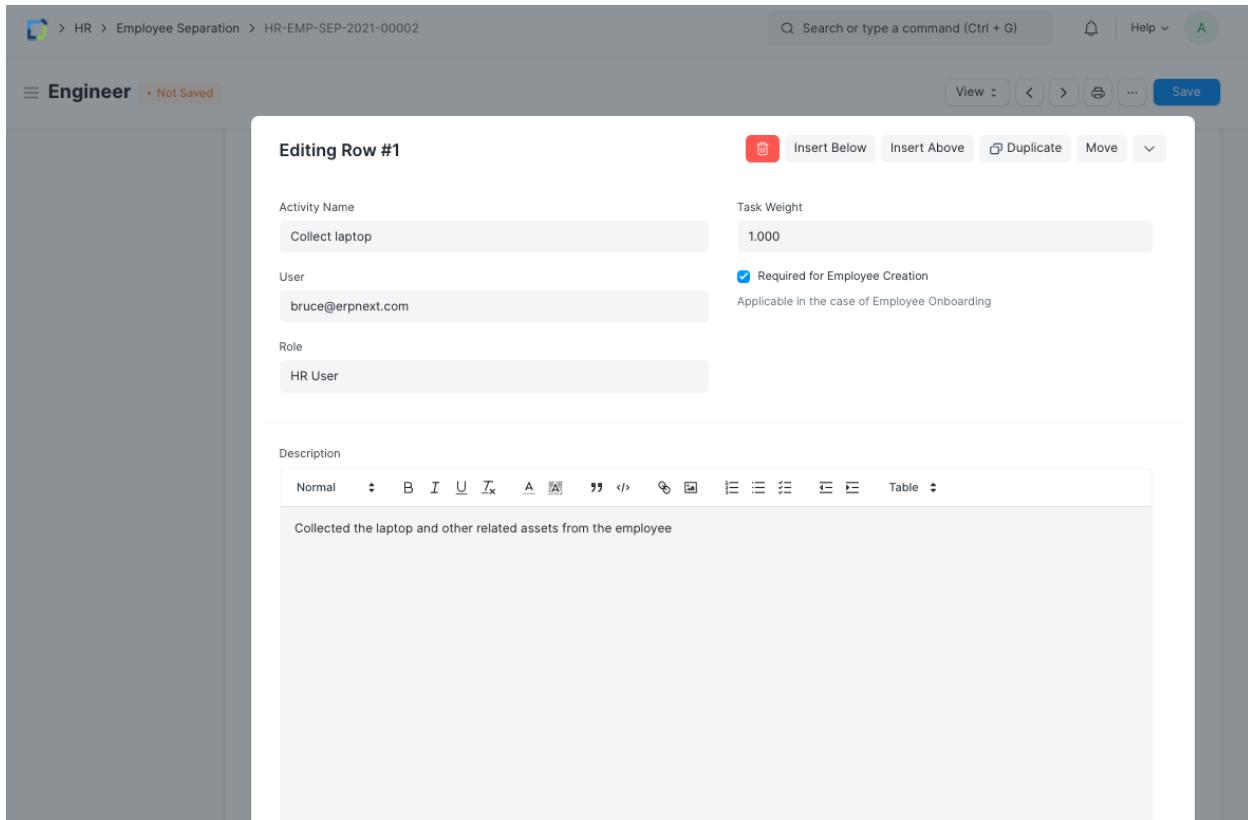
 The sidebar on the left shows links for Assigned To, Attachments, Reviews, Shared With, and Tags."/>

## 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.



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

Required for Employee Creation: 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.

Michelle D'souza Submitted

Employee \* HR-EMP-00002 Company Unico Plastics Inc

Employee Name Michelle D'souza New Company Unico Plastics Inc

Transfer Date \* 01-05-2021 Department Operations - UP

**Employee Transfer Details**

No.	Property	Current	New
1	Department	Operations - UP	<a href="#">Edit</a>

Add Row

Create New Employee Id  
New Employee ID HR-EMP-00005

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.

### 3. Related Topics

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

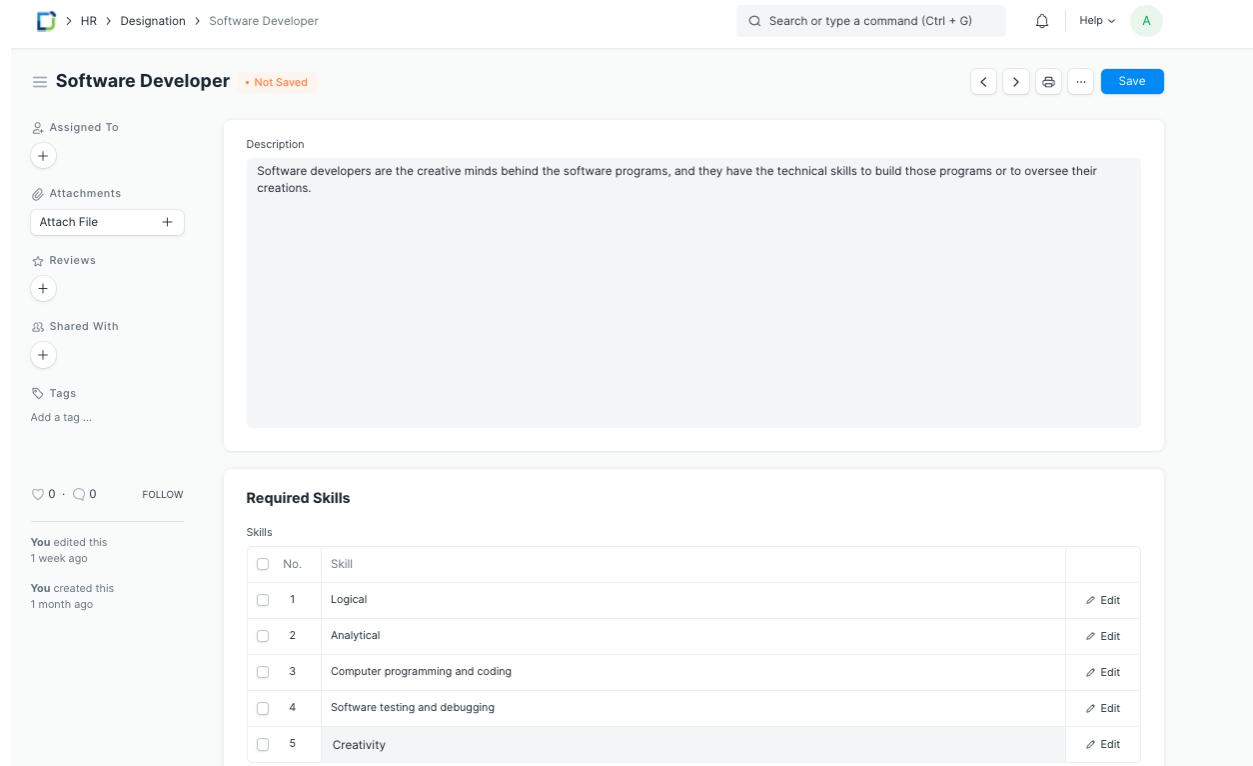
## Employee Skill Map

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

To record an Employee Skill Map go to:

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

Example of Skills for a Designation:



Software Developer • Not Saved

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
<input type="checkbox"/> 2	Analytical
<input type="checkbox"/> 3	Computer programming and coding
<input type="checkbox"/> 4	Software testing and debugging
<input type="checkbox"/> 5	Creativity

## 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.

Employee

Designation

Employee Name

Albert Einstein

Skills

No.	Skill	Proficiency	Evaluation Date	Edit
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

No.	Training	Training Date	Edit
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.

HR > Exit Interview > HR-EXIT-INT-00001

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

**Ananya B • Completed**

**Assigned To**

**Attachments**

**Reviews**

**Shared With**

**Tags**

0 · 0 · FOLLOW

You edited this 14 hours ago

You created this 19 hours ago

**Employee Details**

Employee \*: HR-EMP-00096: Ananya B

Company \*: Frappe

Employee Name: Ananya B

Status \*: Completed

Email ID: ananya@frappe.io

Date: 05-12-2021

Department: Research & Development - F

Date of Joining: 01-01-2016

Designation: Engineer

Relieving Date: 31-10-2021

Reports To: HR-EMP-00004

**Exit Questionnaire**

Reference Document Type: Exit Questionnaire

Reference Document Name: HR-EMP-00096

Questionnaire Email Sent

**Interview Details**

Interviewers \*: agatha@frappe.com

Interview Summary: Reason for quitting

- Moving on for a better opportunity
- Enjoyed working here

Feedback

- Better mentoring, better leadership needed
- Onboarding process can be improved
- Too much ad-hoc work

**Final Decision \***

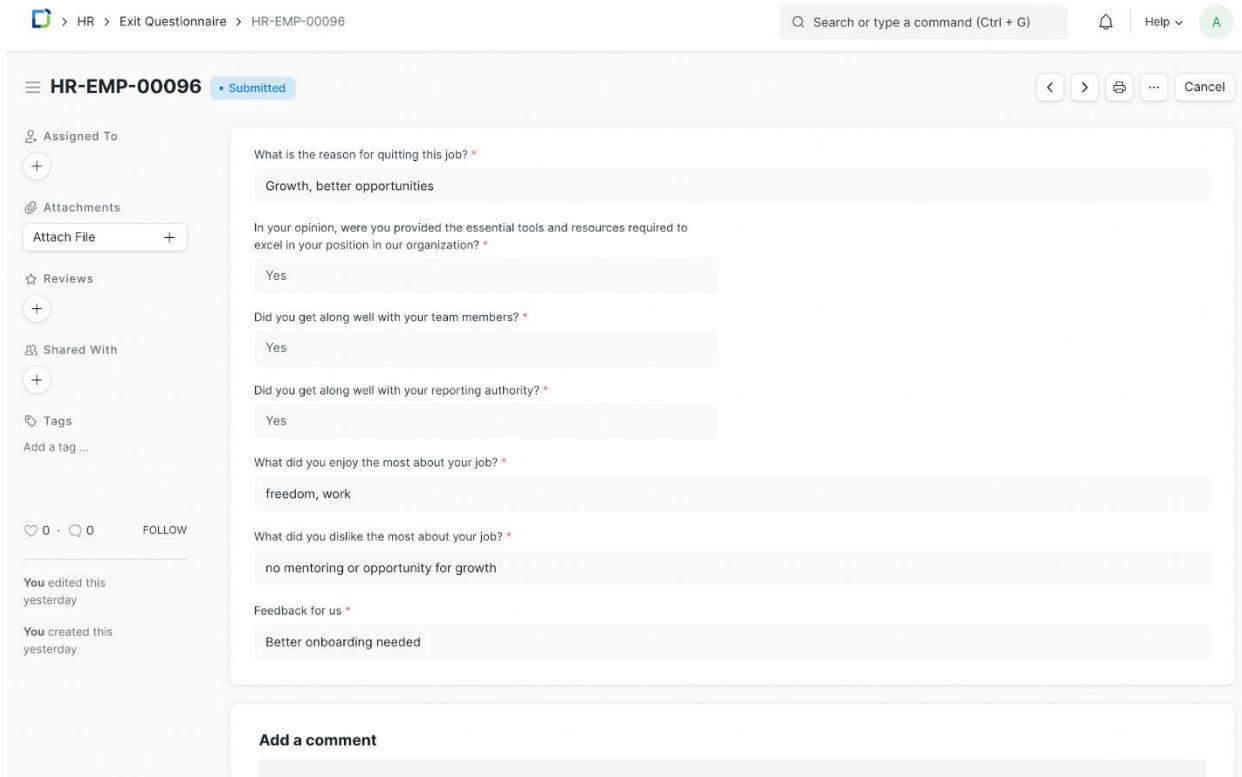
Exit Confirmed

### 3. Features

#### 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:

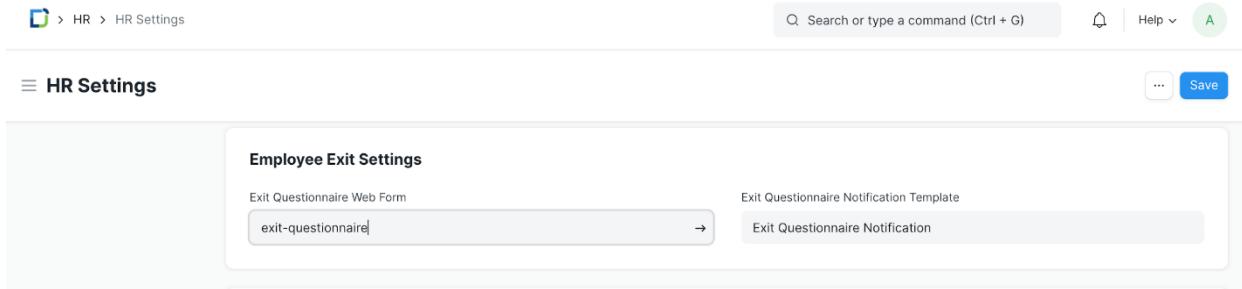


The screenshot shows a custom 'Exit Questionnaire' form titled 'HR-EMP-00096' with a 'Submitted' status. The form includes fields for 'Assigned To' (with a plus icon to add), 'Attachments' (with an 'Attach File' button and a plus icon), 'Reviews' (with a plus icon), 'Shared With' (with a plus icon), and 'Tags' (with a plus icon and a note to 'Add a tag ...'). On the left, there are statistics: 0 likes, 0 comments, and a 'FOLLOW' button. Below these are two timestamped notes: 'You edited this yesterday' and 'You created this yesterday'. The main content area contains the following questions and responses:

- 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, there is a 'Add a comment' 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.



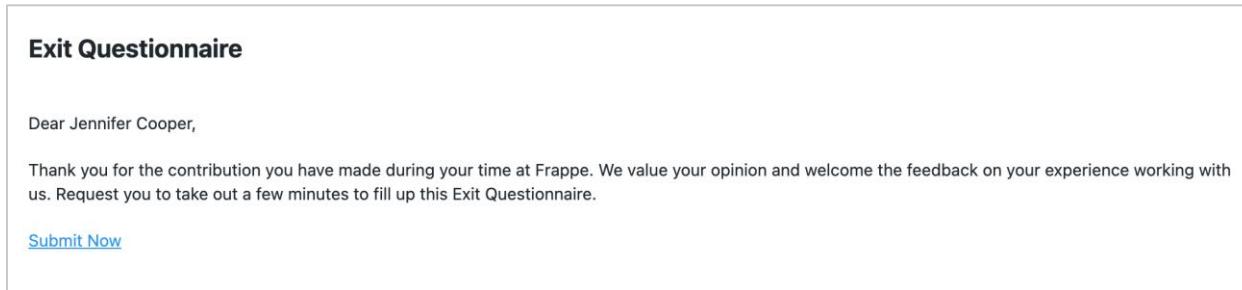
Employee Exit Settings

Exit Questionnaire Web Form → Exit Questionnaire Notification Template

exit-questionnaire → Exit Questionnaire Notification

Save

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.



### Exit Questionnaire

Dear Jennifer Cooper,

Thank you for the contribution you have made during your time at Frappe. We value your opinion and welcome the feedback on your experience working with us. Request you to take out a few minutes to fill up this Exit Questionnaire.

[Submit Now](#)

5. Once your employee fills up this questionnaire, you can link it to the Exit Interview document.



Ananya B • Completed

### Exit Questionnaire

Reference Document Type: Exit Questionnaire

Reference Document Name: HR-EMP-00096

Questionnaire Email Sent

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.

Name	Employee	Employee Name	Frappe	Status	Date	Reports To	Relieving Date	Questionnaire Email Sent	Final Decision
HR-EMP-00009	HR-EMP-00009	HR-EMP-00009	08-12-2021	31-12-2021	HR-EMP-00009	HR-EMP-00009	06-12-2021	03-12-2021	HR-EMP-00004
HR-EMP-00004	HR-EMP-00004	HR-EMP-00004	06-12-2021	03-12-2021	HR-EMP-00004	HR-EMP-00004	06-12-2021	03-12-2021	HR-EMP-00004

## 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 paid\_amount - (claimed\_amount + 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 grand\_total - (total\_amount\_reimbursed + 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

Assigned To  Attachments  Reviews  Tags  Share

Employee  Company   
HR-EMP-00001 Frappe

Employee Name  Status   
Rucha Mahabal Unpaid

Transaction Date  01-04-2024

0 · 0 · FOLLOW

You last edited this · just now

You created this · 2 hours ago

**Employee Details**

<small>Date of Joining</small>	<input type="text"/> <small>10-08-2019</small>	<small>Designation</small>	<input type="text"/> <small>Engineer</small>
<small>Relieving Date</small>	<input type="text"/> <small>30-04-2024</small>	<small>Department</small>	<input type="text"/> <small>Research &amp; Development</small>

**Payables**

<input type="checkbox"/>	<small>No.</small>	<small>Component</small> *	<small>Reference Document</small> ...	<small>Reference Document</small>	<small>Account</small>	<small>Amount</small>	<small>⋮</small>
<input type="checkbox"/>	1	Salary Slip	Salary Slip	Sal Slip/HR-EMP-000...	Payroll Payable - F	₹ 65,392.00	<input type="checkbox"/>
<input type="checkbox"/>	2	Expense Claim	Expense Claim	HR-EXP-2022-00003	Creditors - F	₹ 500.00	<input type="checkbox"/>
<input type="checkbox"/>	3	Bonus	Additional Salary	HR-ADS-23-08-00003		₹ 0.00	<input type="checkbox"/>
<input type="checkbox"/>	4	Leave Encashment	Leave Encashment	HR-ENC-2023-00001		₹ 0.00	<input type="checkbox"/>

Add Row

**Receivables**

<input type="checkbox"/>	<small>No.</small>	<small>Component</small> *	<small>Reference Document</small> ...	<small>Reference Document</small>	<small>Account</small>	<small>Amount</small>	<small>⋮</small>
<input type="checkbox"/>	1	Employee Advance	Employee Advance	HR-EAD-2023-00012	Cash - F	₹ 500.00	<input type="checkbox"/>

Add Row

**Assets Allocated**

Automatically fetches all assets allocated to the employee, if any

<input type="checkbox"/>	<small>No.</small>	<small>Reference</small> *	<small>Asset Name</small>	<small>Cost</small>	<small>Account</small>	<small>Action</small> *	<small>Status</small> *	<small>⋮</small>
<input type="checkbox"/>	1	ACC-ASM-2024-000...	iPhone 14	₹ 70,000.00		Return	Owned	<input type="checkbox"/>
<input type="checkbox"/>	2	ACC-ASM-2024-000...	MacBook Pro 2023	₹ 70,000.00		Recover Cost	Owned	<input type="checkbox"/>

Add Row

**Total Asset Recovery Cost**  
 ₹ 70,000.00

**Totals**

<small>Total Payable Amount</small>	<input type="text"/> ₹ 65,892.00	<small>Total Receivable Amount</small>	<input type="text"/> ₹ 70,500.00
-------------------------------------	----------------------------------	--	----------------------------------

### 3. Features

### 3.1 Asset Cost Recovery

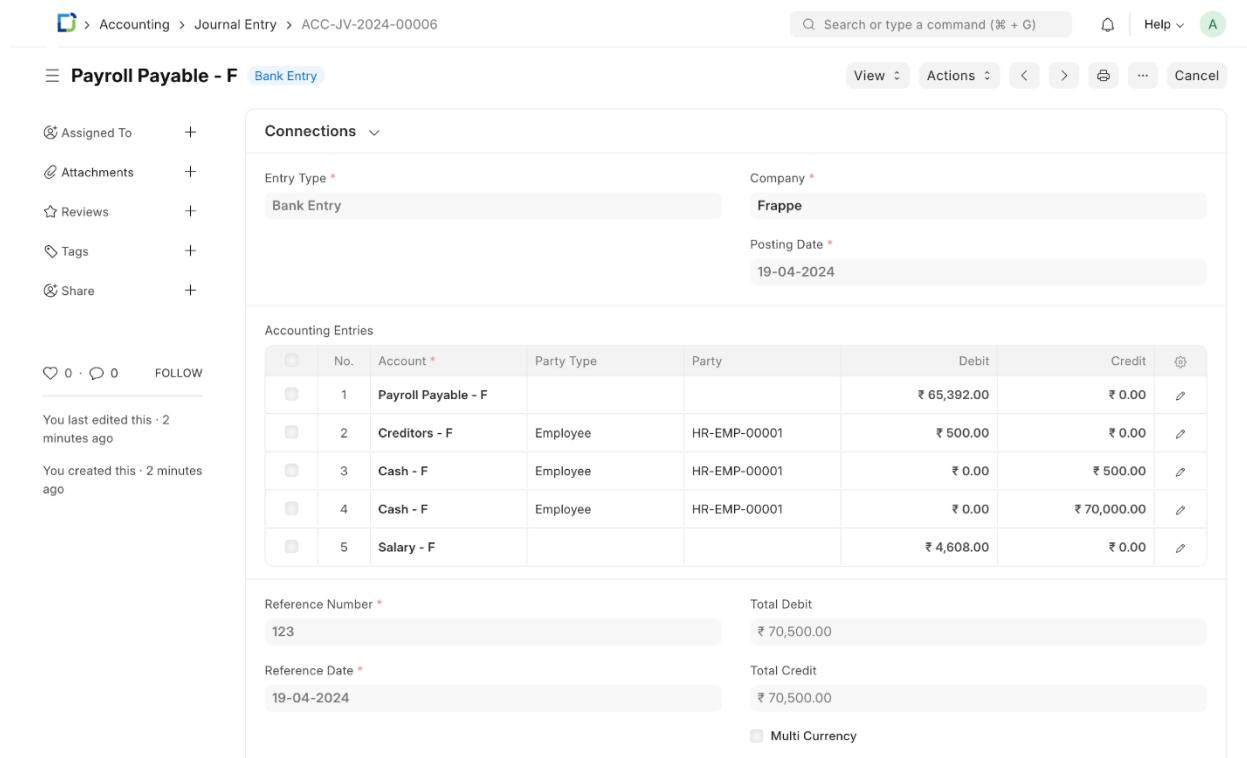
Consider a scenario where you allocate some assets to the employee like laptops/uniforms. In some cases, you might not want to return the asset to the company but instead, recover the asset cost and let the employee own the asset.

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.



The screenshot shows the Frappe Journal Entry creation interface for a Payroll Payable entry. The interface is divided into several sections:

- Header:** Shows the path Accounting > Journal Entry > ACC-JV-2024-00006, a search bar, and a help icon.
- Left Sidebar:** Includes sections for Assigned To, Attachments, Reviews, Tags, and Share, along with a follow button and a note about the last edit.
- Connections:** Set to Bank Entry, Company Frappe, and Posting Date 19-04-2024.
- Accounting Entries:** A table showing five entries:
 

No.	Account *	Party Type	Party	Debit	Credit
1	Payroll Payable - F			₹ 65,392.00	₹ 0.00
2	Creditors - F	Employee	HR-EMP-00001	₹ 500.00	₹ 0.00
3	Cash - F	Employee	HR-EMP-00001	₹ 0.00	₹ 500.00
4	Cash - F	Employee	HR-EMP-00001	₹ 0.00	₹ 70,000.00
5	Salary - F			₹ 4,608.00	₹ 0.00
- Reference:** Shows Reference Number 123, Total Debit ₹ 70,500.00, Reference Date 19-04-2024, Total Credit ₹ 70,500.00, and a Multi Currency checkbox.

# 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 ad Fuel UOM.
5. Save.

New Vehicle

License Plate \*

MH01AB0786

Make \*

Maruti

Model \*

XVI

Odometer Value (Last) \*

5000

Fuel Type \*

Petrol

Fuel UOM \*

Litre

[Edit in full page](#)

[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.

You edited this just now

You created this 3 minutes ago

**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.

**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:  License Plate  Model   
Assign + MH01AB0786 Maruti

Attachments:  Employee  Make   
Attach File + HR-EMP-00002 XVI

Tags:  ODOMETER READING  
Add a tag ...

Reviews:  Date  Odometer  
+ 23-08-2019 5000

Shared With:  REFUELLING DETAILS Supplier   
+ Fuel Qty Scott Ties  
You edited this Fuel Price Invoice Ref  
a few seconds ago 5 ₹ 50.00 SC-1234  
You created this  
12 minutes ago

Heart

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

<input type="checkbox"/>	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	▼

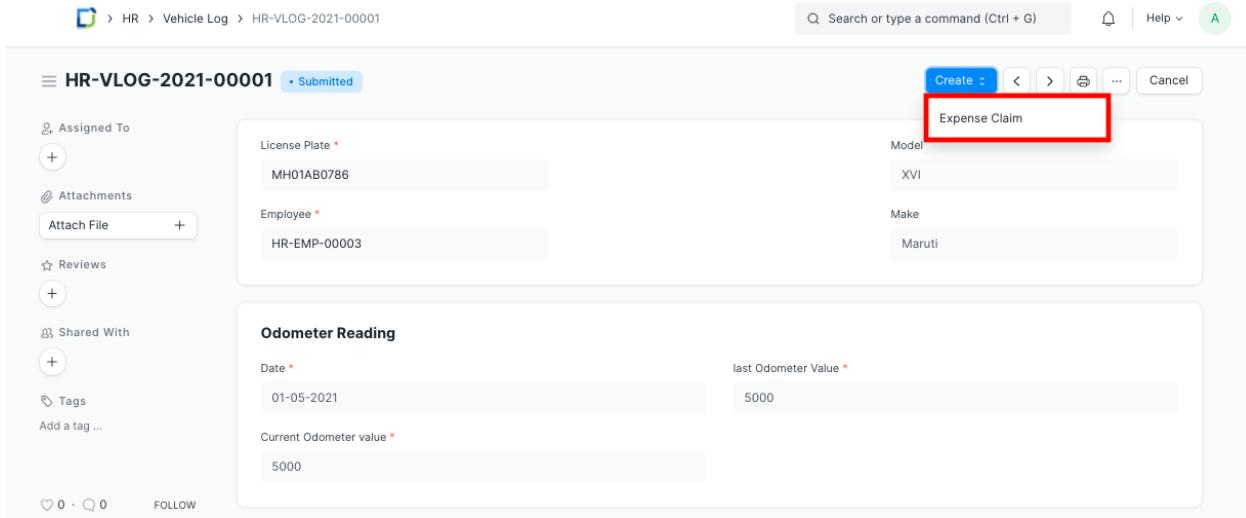
6. Save. Once the information is saved, the Model and Make values will be automatically fetched.

### 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.



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.

Human Resources > Expense Claim
Search or type a command (Ctrl + G) 
Settings 
Help 
81

Michelle Alva 
HR-EXP-2019-00003 
Menu 
Cancel

Reviews

[+ Add](#)

From Employee

HR-EMP-00002: Michelle Alva

Expense Approver

jane@example.com

Shared With

[+ Add](#)

Employee Name

Michelle Alva

Approval Status

Approved

You edited this in a few seconds

You created this a few seconds ago

Expenses

Expense Date	Expense Claim Type	Description	Amount	Sanctioned Amount		
23-08-2019	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

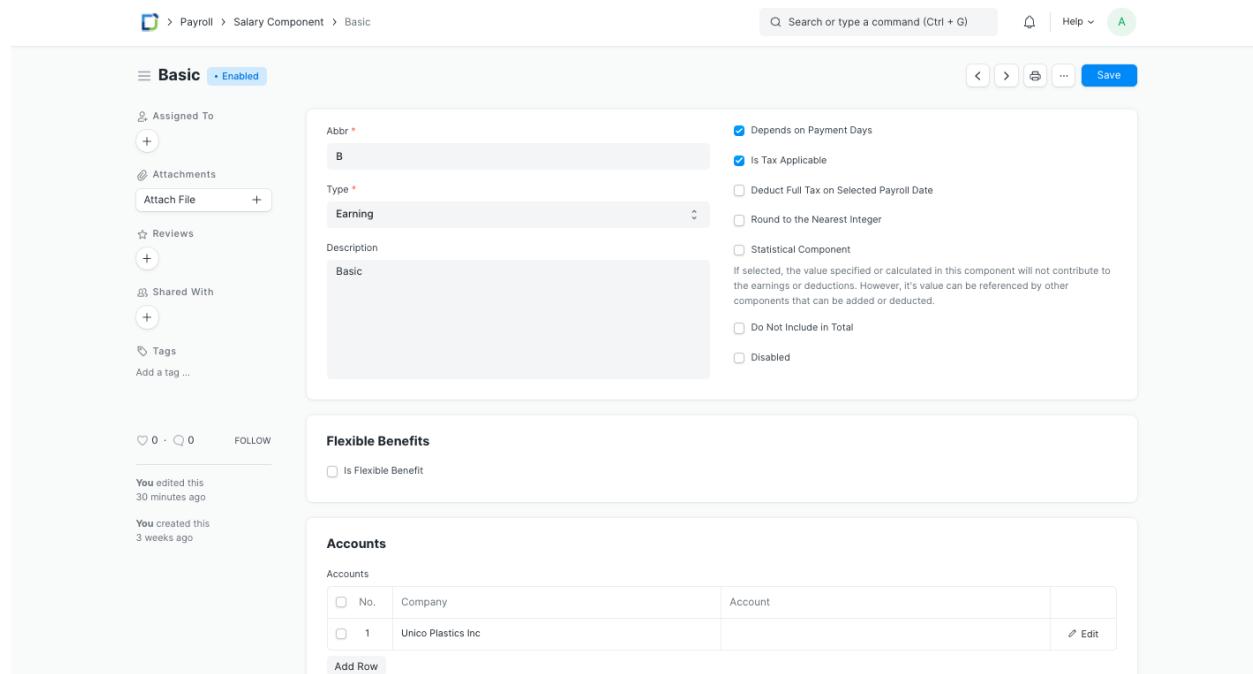
This document allows you to define each Earning and Deduction component which can be used to create a Salary Structure and subsequently create Salary Slip or Additional Salary. You can also

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 wont be added to the total of the Earnings or Deductions of the Salary Slip

## Earning



The screenshot shows the 'Basic' configuration page for a 'Earning' salary component. The component is marked as 'Enabled'. The 'Assigned To' section includes 'Abbr' (B) and 'Type' (Earning). The 'Description' is 'Basic'. Under 'Depends on Payment Days', 'Is Tax Applicable' is checked. Other options like 'Deduct Full Tax on Selected Payroll Date', 'Round to the Nearest Integer', 'Statistical Component', 'Do Not Include in Total', and 'Disabled' are available but not checked. The 'Flexible Benefits' section has an unchecked 'Is Flexible Benefit' option. The 'Accounts' section lists an account for 'Unico Plastics Inc' with account number 1. The interface includes standard navigation buttons (Back, Forward, Save) and a search bar at the top.

- 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

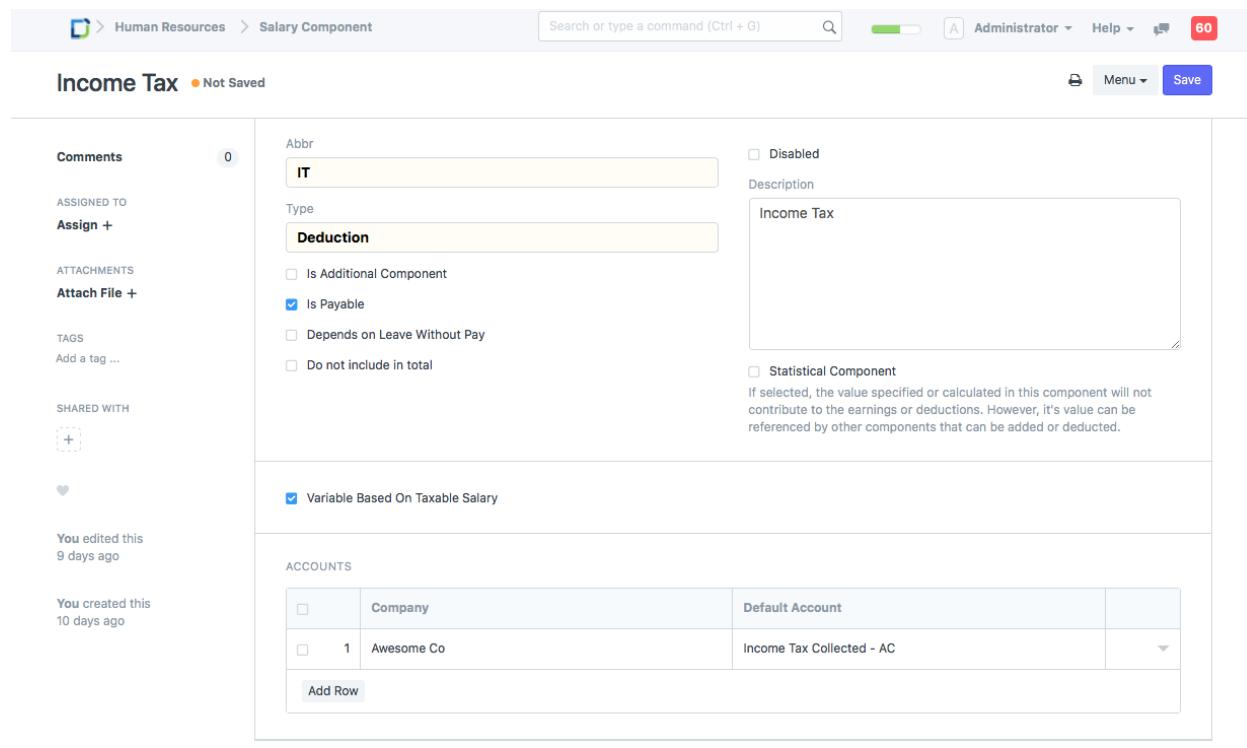
+ Pay Against Benefit Claim: Employees can opt to receive flexible benefits annually via Employee Benefit Claim or along with their salary every month. If you *enable* this, the amount allocated *for* the component will be paid as the Employee submits an [Employee Benefit Claim. Else the amount will 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



The screenshot shows the 'Income Tax' configuration page in a software application. The top navigation bar includes 'Human Resources' and 'Salary Component'. The search bar says 'Search or type a command (Ctrl + G)'. The top right shows 'Administrator', 'Help', and a notification badge '60'. The main area is titled 'Income Tax' with a 'Not Saved' status. On the left, there are sections for 'Comments' (0), 'ASSIGNED TO' (with an 'Assign +' button), 'ATTACHMENTS' (with an 'Attach File +' button), 'TAGS' (with an 'Add a tag ...' button), and 'SHARED WITH' (with a '+' button). The main configuration area has tabs for 'Abbr' (containing 'IT'), 'Type' (containing 'Deduction'), 'Disabled' (unchecked), 'Description' (containing 'Income Tax'), and 'Statistical Component' (unchecked, with a note about not contributing to earnings or deductions). Under the 'Type' tab, checkboxes for 'Is Additional Component', 'Is Payable' (checked), 'Depends on Leave Without Pay', and 'Do not include in total' are shown. Below these tabs is a section for 'Variable Based On Taxable Salary' (checked). The 'ACCOUNTS' tab shows a table with one row: Company 'Awesome Co' and Default Account 'Income Tax Collected - AC'. A 'Add Row' button is at the bottom of the table. The bottom left of the main area shows 'You edited this 9 days ago' and 'You created this 10 days ago'.

- **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.

Salary breakup based on Earnings and Deduction.

**Earnings**

No.	Component	Abbr	Amount	Statistic...	Formula	Edit
1	Basic	B_1	₹ 0.00		Base * 0.4	<input type="button" value="Edit"/>
2	House Rent Allowance	HRA	₹ 0.00		B * 0.3	<input type="button" value="Edit"/>
3	Dearness Allowance	DA	₹ 0.00		B * 0.2	<input type="button" value="Edit"/>

**Deductions**

No.	Component	Abbr	Amount	Statistic...	Formula	Edit
1	Professional Tax	PT	₹ 0.00		B * 0.1	<input type="button" value="Edit"/>
2	Maharashtra Labour Welfare Fund	MLWF	₹ 12.00			<input type="button" value="Edit"/>

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)

Salary Component

Bonus

Salary Component for timesheet based payroll.

Hour Rate

50.00

### **Earnings and Deductions in Salary Structure**

In the "Earnings" and "Deductions" tables, you can select the earnings and deductions components. The condition and formula configured in Salary Component will be copied by default, but you may change this if required. You may also want to select the Base component in the Earnings table. Note that the amount eligible for each employee should be configured in Salary Structure Assignment.

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

### **Condition and Formula**

Editing Row #1

Salary Component  
Basic Salary

Abbr  
BS

Condition  
base > 10000

Amount based on formula

Formula  
base\*.2

1 Professional Tax  
2 TDS  
3 TDS  
Add new row

## Condition and Amount

Editing Row #3

Salary Component  
TDS

Abbr  
T

Condition  
employment\_type=="Intern"

Amount based on formula

Formula  
base\*.1

in conditions and formulas,

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

## Account Details

ACCOUNT	
Mode of Payment	Payment Account
<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

The screenshot shows a software interface for managing employee payroll. The top navigation bar includes 'Payroll' and 'Salary Structure Assignment' with the code 'HR-SSA-21-05-00001'. A search bar and a help icon are also present. The main form is titled 'Nabin Baran Hait' with a 'Submitted' status. On the left, there are sections for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews' (with an 'Add' button), 'Shared With' (with an 'Add' button), and 'Tags' (with an 'Add a tag ...' button). The main content area contains the following data:

Employee *	HR-EMP-00003	Salary Structure *	nabin1-1
Employee Name	Nabin Baran Hait	From Date *	01-04-2021
Company *	Unico Plastics Inc	Income Tax Slab	Income Tax Regime 2021-22
Payroll Payable Account	Payroll Payable - UP	Currency *	INR
Base	₹ 1,00,000.00	Variable	₹ 0.00

Below the form, there are social sharing icons for '0' likes and '0' shares, and a 'FOLLOW' button.

## 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

The screenshot shows the Zoho Payroll Entry interface. At the top, the navigation path is Payroll > Payroll Entry > HR-PRUN-2021-00001. The status bar indicates 'Draft'. The main area is titled 'Select Employees' and includes fields for Posting Date (10-05-2021), Payroll Frequency (Monthly), Company (Unico Plastics Inc), Currency (INR), Exchange Rate (0.01400000), and Payroll Payable Account (Cash In Hand - TC). Below this, there are sections for Employees (Branch, Department, Designation, Number Of Employees) and Employee Details (a table showing one employee: Albert Einstein, No. 1, HR-EMP-00001, Manager, Research & Developme...). The interface also shows user activity: 'You edited this 2 minutes ago' and 'You created this 2 minutes ago'.

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**

[Share](#)

[Like](#)

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**  [Deduct Tax For Unclaimed Employee Benefits](#)

End Date **30-06-2018**  [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.

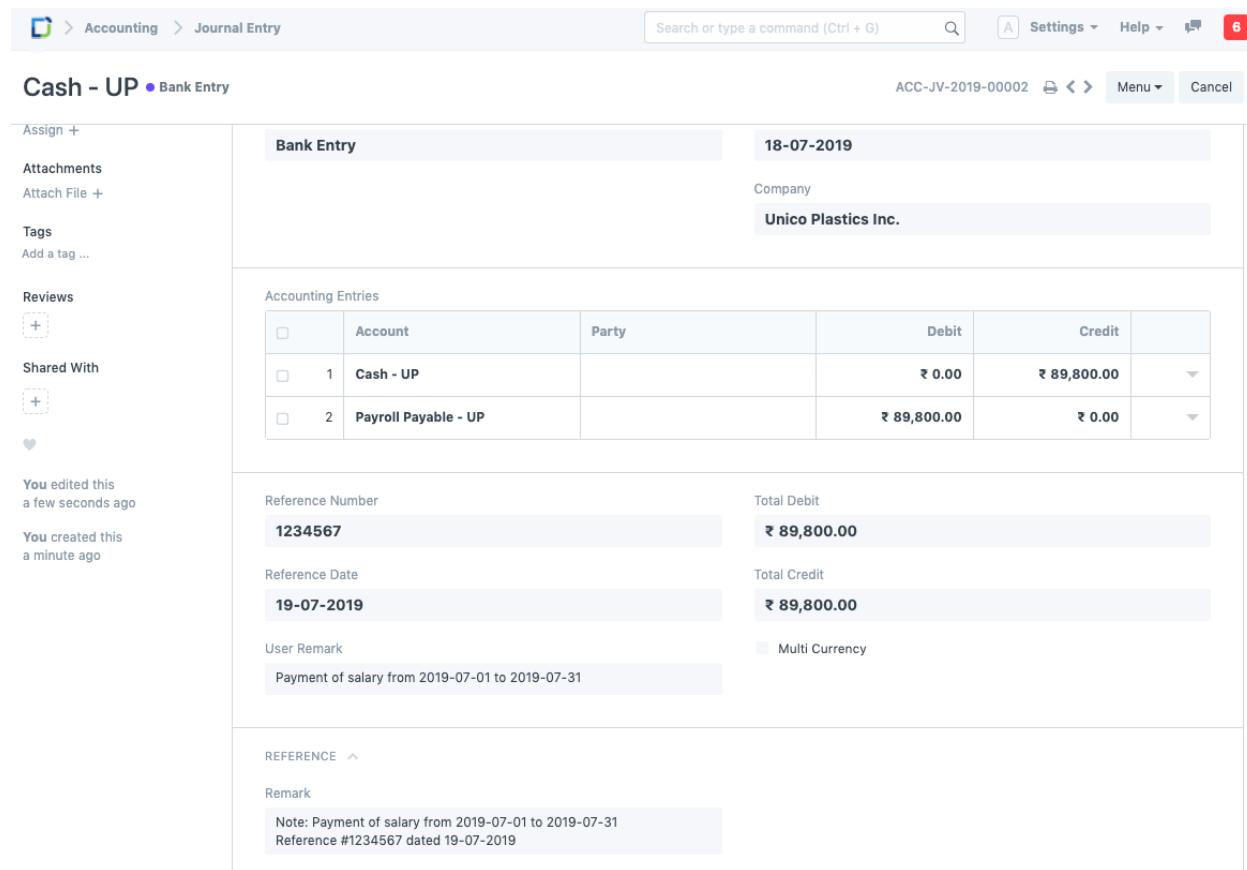
## Booking Salaries in Accounts

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



The screenshot shows the Zoho Books software interface for creating a Bank Entry. The title bar reads "Accounting > Journal Entry". The main area is titled "Bank Entry" and shows the date "18-07-2019". The "Company" field is set to "Unico Plastics Inc.". The "Accounting Entries" table shows two entries:

	Account	Party	Debit	Credit
1	Cash - UP		₹ 0.00	₹ 89,800.00
2	Payroll Payable - UP		₹ 89,800.00	₹ 0.00

Below the table, the "Reference Number" is "1234567" and the "Total Debit" is "₹ 89,800.00". The "Reference Date" is "19-07-2019" and the "Total Credit" is "₹ 89,800.00". The "User Remark" is "Payment of salary from 2019-07-01 to 2019-07-31".

The left sidebar contains various buttons for "Assign +", "Attachments", "Tags", "Reviews", "Shared With", and status messages like "You edited this a few seconds ago" and "You created this a minute ago".

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

Entry Type		Posting Date			
<input type="text" value="Bank Entry"/>		<input type="text" value="19-01-2018"/>			
Series		Company			
<input type="text" value="JV-"/>		<input type="text" value="For Testing"/>			
<input type="button" value="Add Multiple"/> <input type="button" value="Add Row"/>					
	Account	Party	Debit	Credit	
<input type="checkbox"/>	1 <input type="text" value="Cash - FT"/>			₹ 42,240.00	▼
<input type="checkbox"/>	2 <input type="text" value="Payroll Payable - FT"/>		₹ 42,240.00		▼
<input type="button" value="Add Multiple"/> <input type="button" value="Add Row"/>					
Reference Number			Total Debit		
<input type="text"/>			<input type="text"/>		
Reference Date			Total Credit		
<input type="text"/>			<input type="text"/>		
User Remark			<input type="checkbox"/> Multi Currency		
<input type="text" value="Payment of salary from 2018-01-01 to 2018-01-31"/>					
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	Posting Date 29-06-2018	Status Submitted																		
ASSIGNED TO Assign +	Employee EMP/00001: Hatsue Kashiwagi	Company Awesome Co																		
ATTACHMENTS Attach File +	Employee Name Hatsue Kashiwagi	Letter Head Awesome Letter Head																		
TAGS Add a tag ...	Designation Analyst	Branch																		
SHARED WITH 4	Salary Slip Based on Timesheet	Payroll Frequency Monthly																		
	Start Date 01-05-2018	Working Days 23																		
	End Date 31-05-2018	Leave Without Pay 0																		
		Payment Days 23																		
	Deduct Tax For Unclaimed Employee Benefits																			
	Deduct Tax For Unsubmitted Tax Exemption Proof																			
EARNING & DEDUCTION																				
Earning		Deduction																		
<table border="1"><thead><tr><th>Component</th><th>Amount</th></tr></thead><tbody><tr><td>Basic</td><td>₹ 75,000.</td></tr><tr><td>Dearness Allowance</td><td>₹ 15,000.</td></tr><tr><td>House Rent Allowance</td><td>₹ 22,500.</td></tr><tr><td>Medical</td><td>₹ 1,250.0</td></tr><tr><td>Conveyance</td><td>₹ 1,600.0</td></tr><tr><td>Mobile &amp; Telephone R...</td><td>₹ 1,000.0</td></tr></tbody></table>		Component	Amount	Basic	₹ 75,000.	Dearness Allowance	₹ 15,000.	House Rent Allowance	₹ 22,500.	Medical	₹ 1,250.0	Conveyance	₹ 1,600.0	Mobile & Telephone R...	₹ 1,000.0	<table border="1"><thead><tr><th>Component</th><th>Amount</th></tr></thead><tbody><tr><td>Income Tax</td><td>₹ 18,605.</td></tr></tbody></table>	Component	Amount	Income Tax	₹ 18,605.
Component	Amount																			
Basic	₹ 75,000.																			
Dearness Allowance	₹ 15,000.																			
House Rent Allowance	₹ 22,500.																			
Medical	₹ 1,250.0																			
Conveyance	₹ 1,600.0																			
Mobile & Telephone R...	₹ 1,000.0																			
Component	Amount																			
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.

No.	From Amount	To Amount	Percent Deduction	Condition	Edit
1	₹ 2,50,001.00	₹ 5,00,000.00	5%	annual_taxable_earning > 500000	<input type="button" value="Edit"/>
2	₹ 5,00,001.00	₹ 10,00,000.00	20%		<input type="button" value="Edit"/>
3	₹ 10,00,001.00	₹ 0.00	30%		<input type="button" value="Edit"/>

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					
	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.

Payroll > Salary Component > Basic

Basic Enabled

Overview Condition & Formula Flexible Benefits

Abbr \* B

Type \* Earning

Description Basic

Assigned To +

Attachments +

Tags +

Share +

0 · 0 FOLLOW

You last edited this · just now

You created this · 2 months ago

Depends on Payment Days (checked)

Is Tax Applicable (checked)

Deduct Full Tax on Selected Payroll Date (unchecked)

Round to the Nearest Integer (unchecked)

Statistical Component (unchecked)

If enabled, 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.

Do Not Include in Total (unchecked)

Remove if Zero Valued (checked)

If enabled, the component will not be displayed in the salary slip if the amount is zero

Disabled (unchecked)

Accounts

Accounts

No.	Company	Account	Actions
1	Frappe	Cash - F	<input type="button" value="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.

You last edited this 2 minutes ago

You created this 2 months ago

**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`
5. Direct Amount can also be entered based on Condition. See example 3

**Examples**

1. Calculating Basic Salary based on `base`  
Condition: `base < 100000`  
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.

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:

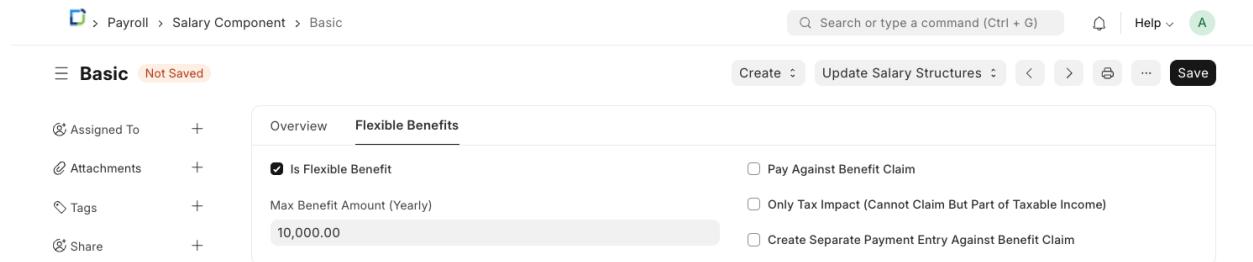
- Is Payable: Select this if the Salary Component is payable.
- Depends on Payment Days: If this checkbox is enabled then the Salary Component will be calculated based on the number of working days.
- Is Tax Applicable: This checkbox is applicable for Earning Components. Selecting this checkbox allows 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 the 'Basic' configuration screen for a Salary Component. The 'Flexible Benefits' tab is selected. Under the 'Is Flexible Benefit' section, the checkbox is checked. Other options like 'Pay Against Benefit Claim', 'Only Tax Impact', and 'Create Separate Payment Entry' are shown with their respective checkboxes. A 'Max Benefit Amount (Yearly)' field is set to 10,000.00.

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.

Salary breakup based on Earnings and Deduction.

**Earnings**

No.	Component	Abbr	Amount	Statistic...	Formula	Edit
1	Basic	B_1	₹ 0.00	<input type="checkbox"/>	Base * 0.4	<input type="checkbox"/> Edit
2	House Rent Allowance	HRA	₹ 0.00	<input type="checkbox"/>	B * 0.3	<input type="checkbox"/> Edit
3	Dearness Allowance	DA	₹ 0.00	<input type="checkbox"/>	B * 0.2	<input type="checkbox"/> Edit

**Deductions**

No.	Component	Abbr	Amount	Statistic...	Formula	Edit
1	Professional Tax	PT	₹ 0.00	<input type="checkbox"/>	B * 0.1	<input type="checkbox"/> Edit
2	Maharashtra Labour Welfare Fund	MLWF	₹ 12.00	<input type="checkbox"/>		<input type="checkbox"/> Edit

**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

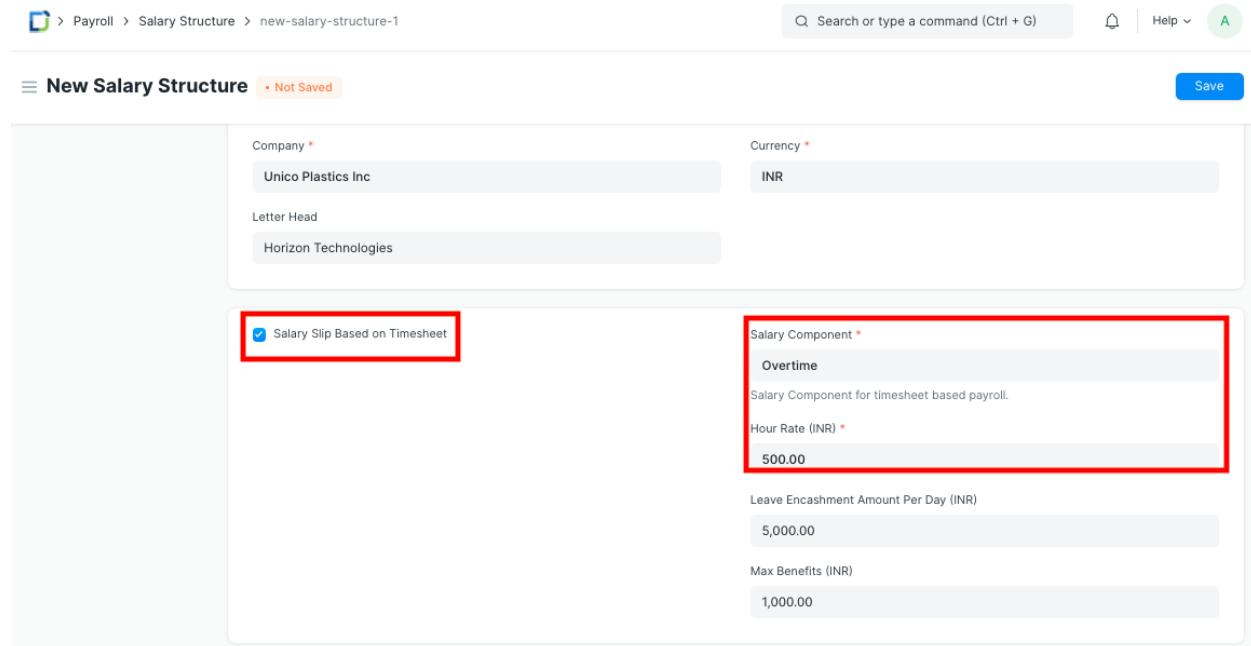
In this section, the Mode of Payment and the Payment Account that is used to pay the salary can be specified.

## 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.



The screenshot shows the 'New Salary Structure' page in DellSuite. At the top, there are navigation links: Home > Payroll > Salary Structure > new-salary-structure-1. To the right are search, help, and user profile icons. The main form has the following fields:

- Company \***: Unico Plastics Inc
- Currency \***: INR
- Letter Head**: Horizon Technologies
- Salary Component \***: Overtime (highlighted with a red box)
  - Description: Salary Component for timesheet based payroll.
  - Hour Rate (INR) \***: 500.00 (highlighted with a red box)
- 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.

Nabin Baran Hait • Submitted

Assigned To: HR-EMP-00003

Employee Name: Nabin Baran Hait

Company: Unico Plastics Inc

Payroll Payable Account: Payroll Payable - UP

From Date: 01-04-2021

Income Tax Slab: Income Tax Regime 2021-22

Currency: INR

Base: ₹ 1,00,000.00

Variable: ₹ 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.

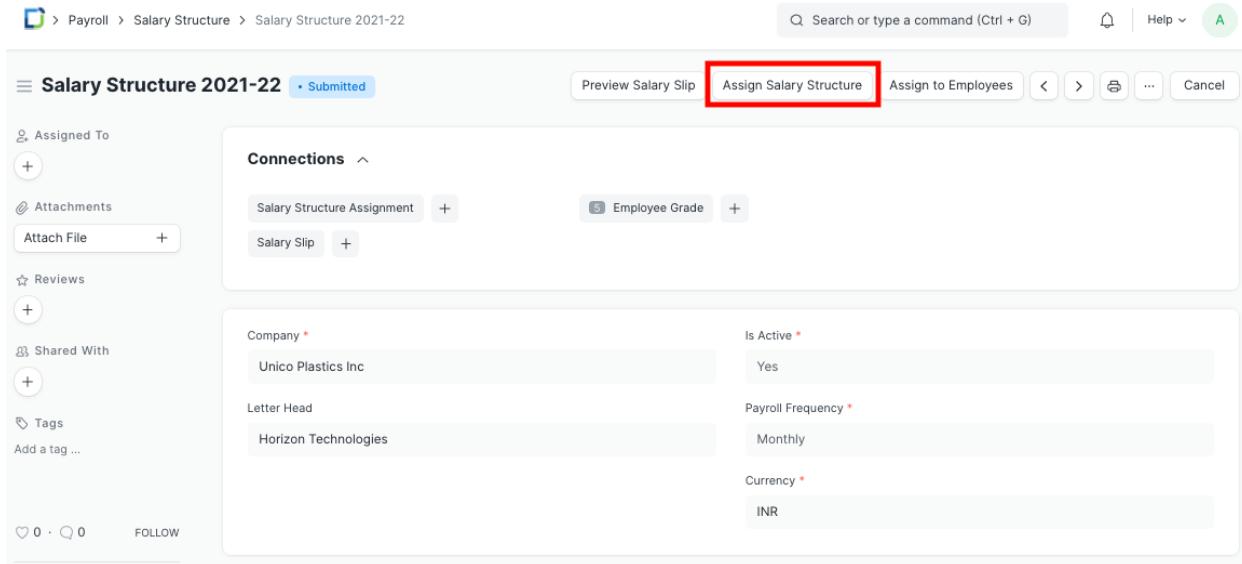
Salary Structure

Bulk Salary Structure Assignment

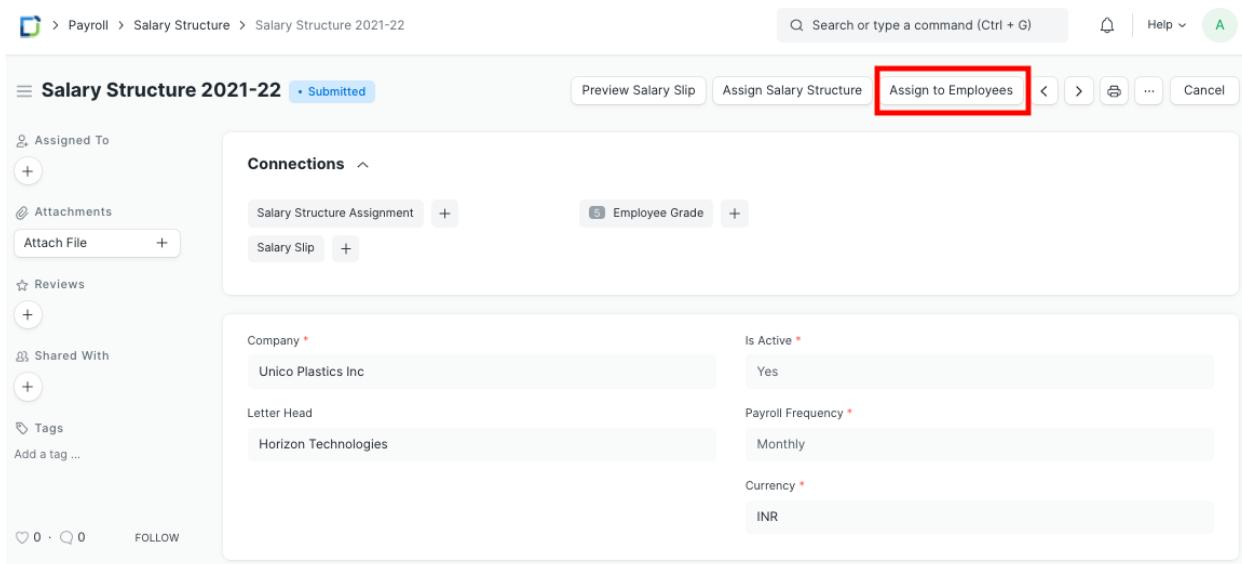
ID	Status	Is Active	Last Updated On
SS1	Submitted	Yes	1M

For version 14, follow the steps below.

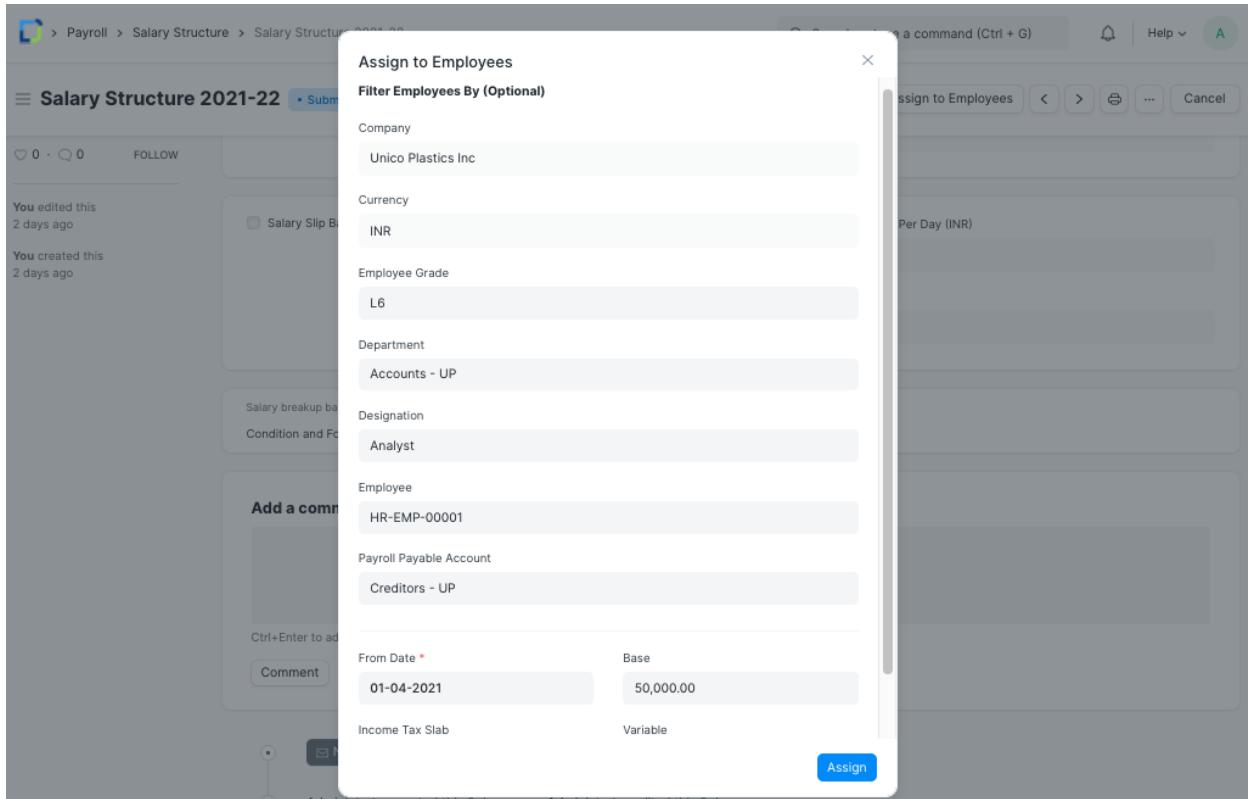
You can assign a Salary Structure to Employee(s) directly through the Salary Structure document. To assign the Salary Structure to a single employee, click on the 'Assign Salary Structure' button in the Salary Structure document.



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



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



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

## 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 A

### Bulk Salary Structure Assignment

Set Assignment Details

Salary Structure *	Company *
SS1	Frappe
From Date *	Payroll Payable Account
01-03-2024	Payroll Payable - F
Income Tax Slab	Currency
The Income Tax Slab (TITS)	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 A

### Salary Structure Assignment

Filter By

Assigned To	Employee	Employee Name	Department	<span>Filter</span>	<span>Last Updated On</span>
Created By	Designation	Salary Structure			
Tags					
Show Tags					
Save Filter					

+ Add Salary Structure Assignment

ID	Employee	Employee Name	Department	<span>Filter</span>	<span>Last Updated On</span>
<input type="checkbox"/> Moga	Submitted	HR-EMP-00006	SS1	HR-SSA-24-03----	now 0 · <span>Heart</span>
<input type="checkbox"/> Joba	Submitted	HR-EMP-00005	SS1	HR-SSA-24-03----	now 0 · <span>Heart</span>
<input type="checkbox"/> Jornad	Submitted	HR-EMP-00004	SS1	HR-SSA-24-03----	now 0 · <span>Heart</span>

## 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

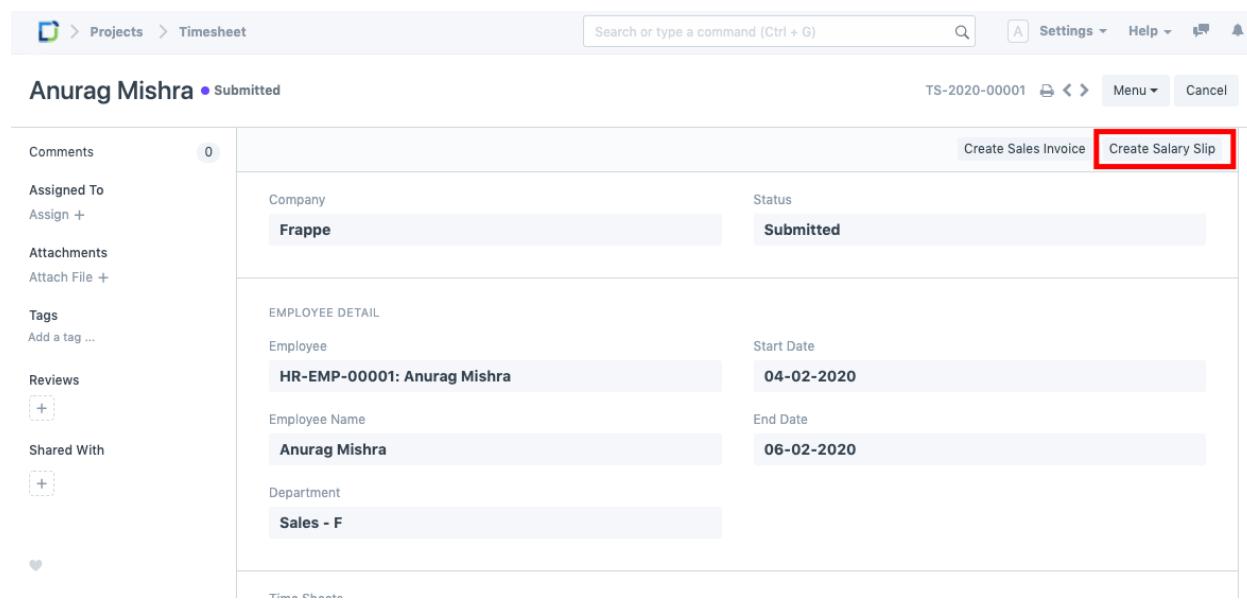
### 3.1. Salary Slip based on Attendance/Leave

HR users can create Salary Slip based on Attendance or leave. The Working days will 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 creating a timesheet. The top navigation bar includes 'Projects > Timesheet', a search bar, and user settings. The main area is for Anurag Mishra, marked as 'Submitted'. On the right, there are buttons for 'Create Sales Invoice' and 'Create Salary Slip', with the latter being highlighted by a red box. The central part of the screen displays 'EMPLOYEE DETAIL' with fields for Employee (HR-EMP-00001: Anurag Mishra), Start Date (04-02-2020), End Date (06-02-2020), and Department (Sales - F). On the left, there are sidebar buttons for Comments, Assigned To, Attachments, Tags, Reviews, and Shared With, each with a plus sign icon.

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.

The screenshot shows a salary slip interface with the following details:

**EARNING & DEDUCTION**

**Earnings**

Component	Amount
Basic	₹ 30,000.00
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

**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

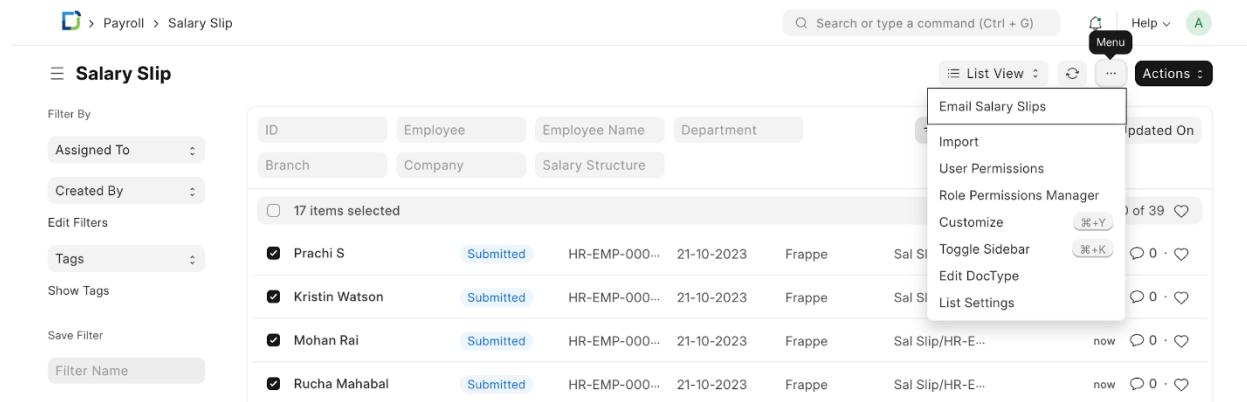
- **Year to Date:** Total salary booked for that particular employee from the beginning of the year (payroll period or fiscal year) up to the current salary slip's end date.
- **Month to Date:** Total salary booked for a particular employee from the beginning of the month (for which the payroll entry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

### 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.

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.



ID	Employee	Employee Name	Department	Branch	Company	Salary Structure	Status	Date	Actions
Prachi S	Submitted	HR-EMP-000...	21-10-2023	Frappe	Sal Sl...	Sal Slip/HR-E...	now	0 · 0	<a href="#">Email Salary Slip</a>
Kristin Watson	Submitted	HR-EMP-000...	21-10-2023	Frappe	Sal Sl...	Sal Slip/HR-E...	now	0 · 0	<a href="#">Email Salary Slip</a>
Mohan Rai	Submitted	HR-EMP-000...	21-10-2023	Frappe	Sal Sl...	Sal Slip/HR-E...	now	0 · 0	<a href="#">Email Salary Slip</a>
Rucha Mahabal	Submitted	HR-EMP-000...	21-10-2023	Frappe	Sal Sl...	Sal Slip/HR-E...	now	0 · 0	<a href="#">Email Salary Slip</a>

## 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

SELECT EMPLOYEES

Posting Date: 07-05-2020

Company: Test Company

Payroll Frequency: Monthly

EMPLOYEES

Branch

Designation

Department

Number Of Employees: 2

Employee Details

	Employee	Employee Name	Department	Designation	
<input type="checkbox"/>	1 HR-EMP-00002: Rahul	Rahul			<input type="button" value="▼"/>
<input type="checkbox"/>	2 HR-EMP-00001: Nabin Baran Hait	Nabin Baran Hait			<input type="button" value="▼"/>

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 ... Create Salary Slips

Tags

0 FOLLOW

You edited this 2 minutes ago

You created this 2 minutes ago

**Select Employees**

Posting Date \* 10-05-2021

Currency \* INR

Payroll Frequency \* Monthly

Exchange Rate \* 0.014000000

Company \* Unico Plastics Inc

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	<span>✓ Edit</span>

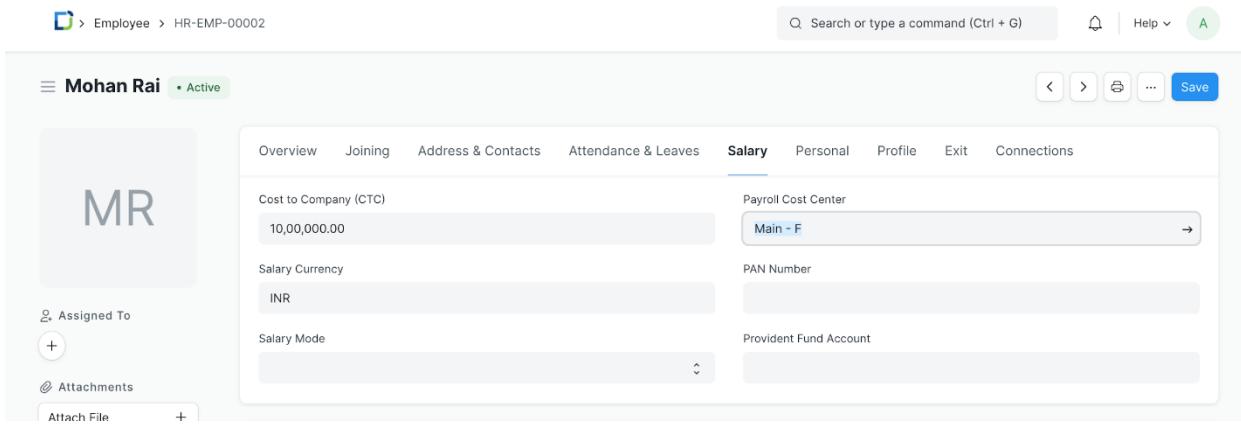
Add Row

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.



Mohan Rai • Active

Overview Joining Address & Contacts Attendance & Leaves **Salary** Personal Profile Exit Connections

Cost to Company (CTC)  
10,00,000.00

Payroll Cost Center  
Main - F

Salary Currency  
INR

PAN Number

Salary Mode

Provident Fund Account

Even multiple cost centers can be assigned against a single Employee. You can do so via the Salary Structure Assignment document.



Rucha Mahabal • Submitted

Payroll Cost Centers ^

Cost Centers	Percentage (%) *
Main - F	50
Engineering - F	50

Add Row

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

Comments	<div style="display: flex; justify-content: space-between;"> <span><a href="#">View</a></span> <span><a href="#">Make</a></span> </div>																																			
Assigned To	<div style="display: flex; justify-content: space-between;"> <span>Entry Type</span> <span>Posting Date</span> </div>																																			
Attachments	<div style="display: flex; justify-content: space-between;"> <span>Journal Entry</span> <span>18-07-2019</span> </div>																																			
Tags	<div style="display: flex; justify-content: space-between;"> <span>Company</span> <span>Unico Plastics Inc.</span> </div>																																			
Reviews	<div style="display: flex; justify-content: space-between;"> <span>Accounting Entries</span> </div>																																			
Shared With	<table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Account</th> <th>Party</th> <th>Debit</th> <th>Credit</th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>1 Basic - UP</td> <td></td> <td>₹ 60,000.00</td> <td>₹ 0.00</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>2 House Rent Allowance - UP</td> <td></td> <td>₹ 30,000.00</td> <td>₹ 0.00</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>3 Professional Tax - UP</td> <td></td> <td>₹ 0.00</td> <td>₹ 200.00</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>4 Payroll Payable - UP</td> <td></td> <td>₹ 0.00</td> <td>₹ 89,800.00</td> <td></td> </tr> </tbody> </table>						<input type="checkbox"/>	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	
<input type="checkbox"/>	Account	Party	Debit	Credit																																
<input type="checkbox"/>	1 Basic - UP		₹ 60,000.00	₹ 0.00																																
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<input type="checkbox"/>	4 Payroll Payable - UP		₹ 0.00	₹ 89,800.00																																
You edited this a minute ago	<div style="display: flex; justify-content: space-between;"> <span>User Remark</span> <span>Total Debit</span> </div>																																			
You created this a minute ago	<div style="display: flex; justify-content: space-between;"> <span>Accrual Journal Entry for salaries from 2019-07-01 to 2019-07-31</span> <span>₹ 90,000.00</span> </div>																																			
	<div style="display: flex; justify-content: space-between;"> <span>Total Credit</span> <span></span> </div>																																			
	<div style="display: flex; justify-content: space-between;"> <span>₹ 90,000.00</span> <span></span> </div>																																			

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 [Print](#) [Cancel](#) [Menu](#)

Assign + Attachments Attach File + Tags Add a tag ...	Bank Entry	18-07-2019															
	Company Unico Plastics Inc.																
Accounting Entries <table border="1"> <thead> <tr> <th></th> <th>Account</th> <th>Party</th> <th>Debit</th> <th>Credit</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>1 Cash - UP</td> <td></td> <td>₹ 0.00</td> <td>₹ 89,800.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>2 Payroll Payable - UP</td> <td></td> <td>₹ 89,800.00</td> <td>₹ 0.00</td> </tr> </tbody> </table>				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
	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 <b>1234567</b>		Total Debit <b>₹ 89,800.00</b>															
Reference Date <b>19-07-2019</b>		Total Credit <b>₹ 89,800.00</b>															
User Remark Payment of salary from 2019-07-01 to 2019-07-31																	
REFERENCE <a href="#">▲</a> 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 software interface for managing payroll. The top navigation bar includes 'Payroll > Additional Salary > HR-ADS-21-05-00001'. The search bar says 'Search or type a command (Ctrl + G)'. The main area displays a form for 'HR-EMP-00001' with the status 'Submitted'. The form fields are as follows:

- Assigned To:** HR-EMP-00001
- Attachments:** Attach File
- Reviews:** Add a review
- Shared With:** Add a tag
- Tags:** Add a tag
- Employee:** HR-EMP-00001
- Employee Name:** Albert Einstein
- Salary Component:** Incentive
- Salary Component Type:** Earning
- Amount:** ₹ 3,000.00
- Company:** Unico Plastics Inc
- Department:** Research & Development - UP
- Currency:** INR
- Payroll Date:** 01-05-2021
- Date on which this component is applied:** 01-05-2021
- Is Recurring:**
- Overwrite Salary Structure Amount:**
- Deduct Full Tax on Selected Payroll Date:**

### 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.

Search or type a command (Ctrl + G)

HR-RTB-2021-00001 • Submitted

Assigned To	Company *	Employee Name
+ (button)	Unico Plastics Inc	Albert Einstein
Attachments	Employee *	Department
Attach File + (button)	HR-EMP-00001	Research & Development - UP
Reviews	Bonus Payment Date *	Date of Joining
+ (button)	01-09-2021	2005-07-01
Shared With	Bonus Amount *	Currency *
+ (button)	₹ 5,000.00	INR
Tags	Salary Component *	
Add a tag ...	Arrear	

### 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

George Smith • Submitted

HR-EINV-20-01-00001

Comments	0	Employee	Payroll Date
Assigned To		HR-EMP-00001: George Smith	01-02-2020
Attachments		Incentive Amount	Salary Component
Attach File		₹ 5,000.00	Arrear
Tags		Employee Name	
		George Smith	
Reviews		Additional Salary	
		HR-ADS-20-01-00002	
Shared With		Add a 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



80C

Comments 0

ASSIGNED TO Assign +

Max Amount  
1,50,000.00

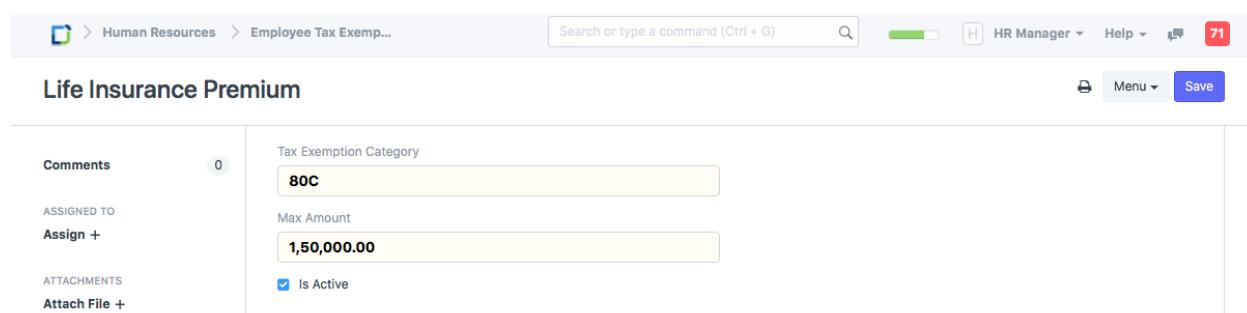
Is Active

Menu Save

## 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



Life Insurance Premium

Comments 0

ASSIGNED TO Assign +

ATTACHMENTS Attach File +

Tax Exemption Category  
80C

Max Amount  
1,50,000.00

Is Active

Menu Save

## **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.

Employee \*: HR-EMP-00001 | Payroll Period \*: 2021-22

Employee Name: Albert Einstein | Company: Unico Plastics Inc

Department: Research & Development - UP | Currency \*: INR

No.	Exemption Sub Category	Exemption Category	Maximum Exempted ...	Declared Amount	Edit
1	Mutual Funds	80C	₹ 1,50,000.00	₹ 2,00,000.00	<input type="button" value="Edit"/>
2	Mediclaim	80D	₹ 50,000.00	₹ 30,000.00	<input type="button" value="Edit"/>

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, B0CC etc.

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

A screenshot of a software interface for managing employee tax exemption categories. The top navigation bar shows 'Payroll > Employee Tax Exemption Category > 80D'. The main area is titled '80D' and contains a form with the following fields: 'Assigned To' (with a plus icon), 'Attachments' (with a plus icon), 'Max Exemption Amount' (set to '50,000.00'), and 'Is Active' (with a checked checkbox). The right side of the screen includes a search bar, a help icon, and a save button.

### 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

A screenshot of a software interface for managing employee tax exemption sub-categories. The top navigation bar shows 'Payroll > Employee Tax Exemption Sub Category > Mutual Funds'. The main area is titled 'Mutual Funds' and contains a form with the following fields: 'Assigned To' (with a plus icon), 'Attachments' (with a plus icon), 'Reviews' (with a plus icon), 'Tax Exemption Category' (set to '80c'), 'Max Exemption Amount' (set to '1,50,000.00'), and 'Is Active' (with a checked checkbox). The right side of the screen includes a search bar, a help icon, and a save button.

### 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.

HRA EXEMPTION	
Monthly House Rent	₹ 15,000.00
Annual HRA Exemption	₹ 1,08,000.00
<input checked="" type="checkbox"/> Rented in Metro City	
HRA as per Salary Structure	₹ 30,000.00
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.

The screenshot shows the DellSuite Payroll interface for an Employee Tax Exemption Proof Submission. The page title is "HR-TAX-PRF-2021-00001" and it is marked as "Draft". The main content includes a table of "Tax Exemption Proofs" and an "HRA Exemption" section. The "Tax Exemption Proofs" table has columns for No., Exemption Sub Categ..., Exemption Category, Maximum Exemption ..., Type of Proof, and Actual Amount. The "HRA Exemption" section includes fields for House Rent Payment Amount, Rented in Metro City, Rented From Date, Rented To Date, and various calculated amounts like Monthly House Rent and Total Eligible HRA Exemption. At the bottom, there is a summary table showing Total Actual Amount and Total Exemption Amount.

No.	Exemption Sub Categ...	Exemption Category	Maximum Exemption ...	Type of Proof	Actual Amount
1	Life Insurance Premium	80C	₹ 1,50,000.00	Policy Document	₹ 76,000.00
2	Mutual Funds	80C	₹ 1,50,000.00	Document	₹ 1,00,000.00
3	Mediclaim	80D	₹ 50,000.00	Insurance policy	₹ 20,000.00

Total Actual Amount	Total Exemption Amount
₹ 5,56,000.00	₹ 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.

HR-INCOME-000002 • Draft

Assigned To

Attachments

Reviews

Shared With

Tags

Submit this document to confirm

Employee *	Company *
HR-EMP-00005	Unico Plastics Inc
Employee Name	Source
Michelle D'souza	Capital gains on stock market
Payroll Period *	Amount *
2021-22	40,000.00

Submit

## 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 Dispensed Amount**  
**₹ 27,000.00**

**Remainig Benefits (Yearly)**  
**₹ 73,000.00**

**Total Amount**  
**₹ 27,000.00**

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

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.

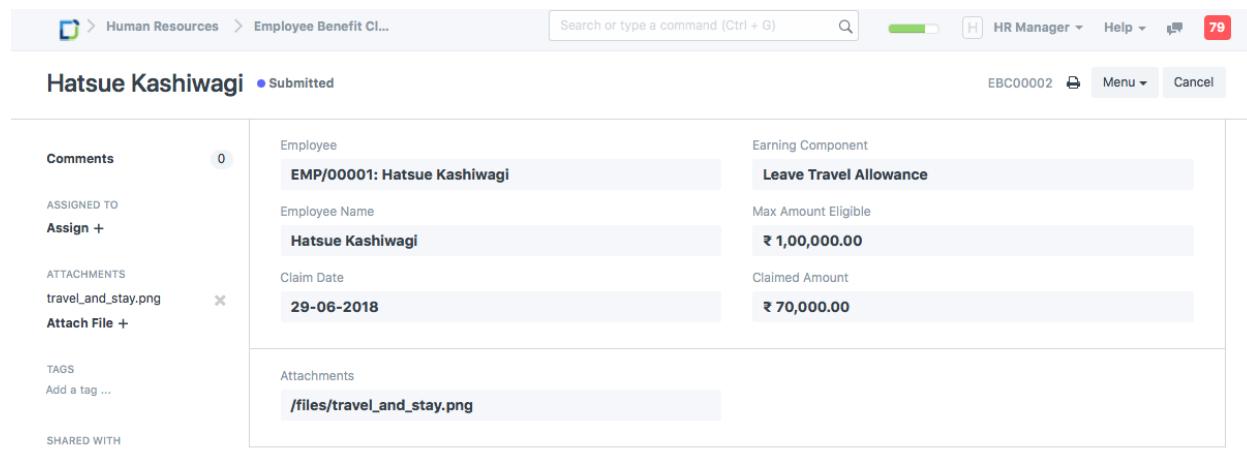
Also, note that those components which are to be received based on Employee Benefit Claims can also be part of the application, but will only be disbursed lump-sum, as part of their salary when the Employee submits a claim for it.

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 the 'Employee Benefit Claim' creation screen. The top navigation bar includes 'Human Resources > Employee Benefit Cl...', a search bar, and a '79' notifications icon. The main form is titled 'Hatsue Kashiwagi • Submitted'. On the left, there are sections for 'Comments' (0), 'ASSIGNED TO' (with an 'Assign +' button), 'ATTACHMENTS' (with a file named 'travel\_and\_stay.png' and an 'Attach File +' button), 'TAGS' (with an 'Add a tag ...' button), and 'SHARED WITH' (empty). The main form fields are: 'Employee' (EMP/00001: Hatsue Kashiwagi), 'Earning Component' (Leave Travel Allowance), 'Employee Name' (Hatsue Kashiwagi), 'Max Amount Eligible' (₹ 1,00,000.00), 'Claim Date' (29-06-2018), 'Claimed Amount' (₹ 70,000.00), and 'Attachments' (links to '/files/travel\_and\_stay.png').

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

Gratuity

Search or type a command (Ctrl + G)

Settings Help Menu Submit

HR-GRA-PAY-00005 • Draft

Assigned To: Employee: HR-EMP-00003 Posting date: 03-12-2020

Attachments: Employee Name: Shristi Status: Draft

Tags: Department: Sales - F Company: frappe

Reviews: Designation: Analyst Gratuity Rule: Indian Standard Gratuity Rule

Shared With: +

PAYMENT CONFIGURATION

Pay via Salary Slip Current Work Experience: 21

Payroll Date: 24-12-2020 Total Amount: ₹ 12,11,538.30

Salary Component: Gratuity payment

You edited this 12 minutes ago

You created this 12 minutes ago

### 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**

Current Work Experience **21**

Salary Component **Gratuity payment**

Total Amount **₹ 12,11,538.30**

On Submit, it will automatically create Additional Salary with respective Payroll Date and Salary Component.

Additional Salary					Menu ▾	Refresh	New
<p>VIEWS</p> <p>Reports ▾</p> <p>List</p> <p>Dashboard</p> <p>Kanban ▾</p> <p>FILTER BY</p> <p>Assigned To ▾</p> <p>Created By ▾</p> <p>Add Fields +</p> <p>TAGS</p> <p>Tags ▾</p> <p>Show Tags</p> <p>SAVE FILTER</p> <p>Filter Name</p>	<input style="width: 100px; height: 20px; border: 1px solid #ccc; margin-right: 10px;" type="text"/> Name <input style="width: 100px; height: 20px; border: 1px solid #ccc; margin-right: 10px;" type="text"/> Employee <input style="width: 100px; height: 20px; border: 1px solid #ccc; margin-right: 10px;" type="text"/> Salary Component <input style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;" type="button" value="Add Filter"/> <input style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;" type="button" value="Clear Filters"/> <input style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;" type="button" value="Reference Document = HR-GR..."/> <input style="border: 1px solid #ccc; padding: 2px;" type="button" value="X"/> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Last Modified On <input style="border: 1px solid #ccc; padding: 2px;" type="button" value="▼"/></span> </div>	<input type="checkbox"/> Employee <input type="checkbox"/> <b>HR-EMP-00003</b>	<input type="radio"/> <b>Submitted</b>	Status <b>Shristi</b>	Employee Name <b>Gratuity payment</b>	Salary Compon... <b>0-12-00001</b>	now <input type="checkbox"/> 0
							1 of 1

## 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	Current Work Experience
Payable Account	9
Expense Account	Total Amount
Salary - F	₹ 5,19,230.70
Mode of Payment	Paid Amount
Cash	₹ 0.00
Cost Center	
Main - F	

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

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">ACCOUNTS <span style="float: right;">▼</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">AMOUNT</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Paid Amount (INR) 5,19,230.70</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">REFERENCE</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Get Outstanding Invoice</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Payment References</div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 15%;">Type</th> <th style="width: 30%;">Name</th> <th style="width: 15%;">Total Amount</th> <th style="width: 15%;">Outstanding</th> <th style="width: 15%;">Allocated</th> <th style="width: 5%;"></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Gratuity</td> <td>5,19,230.700</td> <td>5,19,230.700</td> <td>5,19,230.700</td> <td><span style="float: right;">▼</span></td> </tr> </tbody> </table> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Add Row</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">WRITEOFF</div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;">Total Allocated Amount (INR) ₹ 5,19,230.70</div> <div style="width: 45%;">Unallocated Amount (INR) 0.00</div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;">Difference Amount (INR) ₹ 0.00</div> <div style="width: 45%;"></div> </div>		Type	Name	Total Amount	Outstanding	Allocated		<input type="checkbox"/>	1	Gratuity	5,19,230.700	5,19,230.700	5,19,230.700	<span style="float: right;">▼</span>	
	Type	Name	Total Amount	Outstanding	Allocated										
<input type="checkbox"/>	1	Gratuity	5,19,230.700	5,19,230.700	5,19,230.700	<span style="float: right;">▼</span>									

# 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 resignation... Not Saved

Comments	0	Applicable Earnings Component	<input type="checkbox"/> Disable																																			
Assigned To	Assign +	Basic <input type="button" value="X"/> Arrear <input type="button" value="X"/>	Calculate Gratuity Amount Based On																																			
Attachments	Attach File +	Salary components should be part of the Salary Structure.	Sum of all previous slabs																																			
Tags	Add a tag ...	Work Experience Calculation method	Minimum Year for Gratuity																																			
Reviews	<input type="button" value="+"/>	Round off Work Experience	1																																			
Shared With	<input type="button" value="+"/>	Total working Days Per Year	365																																			
<p><b>GRATUITY RULES</b></p> <p>Leave From and To 0 for no upper and lower limit.</p> <table border="1"> <thead> <tr> <th></th> <th>From(Year)</th> <th>To(Year)</th> <th>Fraction of Applicable Earnings</th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>0</td> <td>1</td> <td>0</td> <td><input type="button" value="▼"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>2</td> <td>0.233</td> <td><input type="button" value="▼"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>2</td> <td>3</td> <td>0.467</td> <td><input type="button" value="▼"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>3</td> <td>5</td> <td>0.700</td> <td><input type="button" value="▼"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>4</td> <td>5</td> <td></td> <td><input type="button" value="▼"/></td> </tr> <tr> <td colspan="5"><input type="button" value="Add Row"/></td> </tr> </tbody> </table>					From(Year)	To(Year)	Fraction of Applicable Earnings		<input type="checkbox"/>	0	1	0	<input type="button" value="▼"/>	<input type="checkbox"/>	1	2	0.233	<input type="button" value="▼"/>	<input type="checkbox"/>	2	3	0.467	<input type="button" value="▼"/>	<input type="checkbox"/>	3	5	0.700	<input type="button" value="▼"/>	<input type="checkbox"/>	4	5		<input type="button" value="▼"/>	<input type="button" value="Add Row"/>				
	From(Year)	To(Year)	Fraction of Applicable Earnings																																			
<input type="checkbox"/>	0	1	0	<input type="button" value="▼"/>																																		
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<input type="checkbox"/>	4	5		<input type="button" value="▼"/>																																		
<input type="button" value="Add Row"/>																																						

You edited this 1 hour ago

You created this 1 month ago

### 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 your 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...

Print
Back
Forward
Menu
Save

**Shared With**

+ Add

**GRATUITY RULES**

Leave **From** and **To** 0 for no upper and lower limit.

**Current Work Experience**

	From(Year)	To(Year)	Fraction of Applicable E...
<input type="checkbox"/>	0	1	0
<input type="checkbox"/>	1	3	0.233
<input type="checkbox"/>	3	5	0.467
<input type="checkbox"/>	5	0	0.700

Add Row

1. 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)

2. 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.

Maximum Loan Amount  
₹ 2,00,000.00

Company \*  
Unico Plastics Inc

Rate of Interest (%) Yearly \*  
13.5%

Is Term Loan

Disabled

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

**Account Details**

Mode of Payment \*  
Cash

Interest Income Account \*  
Sales - UP

Payment Account \*  
Cash - UP

Penalty Income Account \*  
Service - UP

Loan Account \*  
HDFC - 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

Connections ▾

Loan +  
Loan Security Pledge +

Attachments  
Attach File +

Reviews  
+  
Shared With  
+  
Tags  
Add a tag ...

0 FOLLOW

Applicant Type \* Customer Company \* Unico Plastics Inc

Applicant \* Arvind Goyal Posting Date 17-05-2021

Status Open

You edited this just now

You created this just now

**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

No.	Loan Security	Quantity	Loan Security Price	Amount	<i>Edit</i>
1	INFY	100	₹ 5,00,000.00	₹ 5,00,000.00	<i>Edit</i>

Add Row

Maximum Loan Amount ₹ 2,50,000.00

### 3. Features

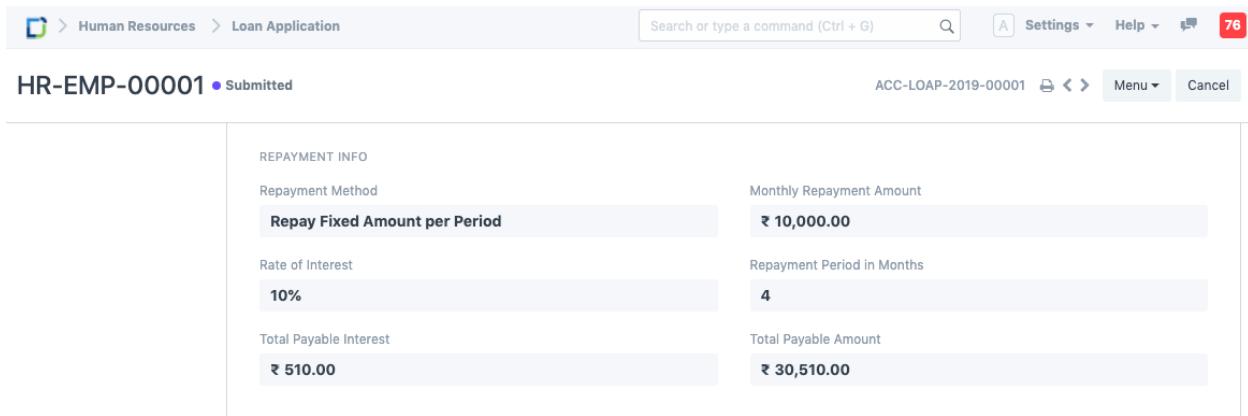
#### 3.1 Repayment Method

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.



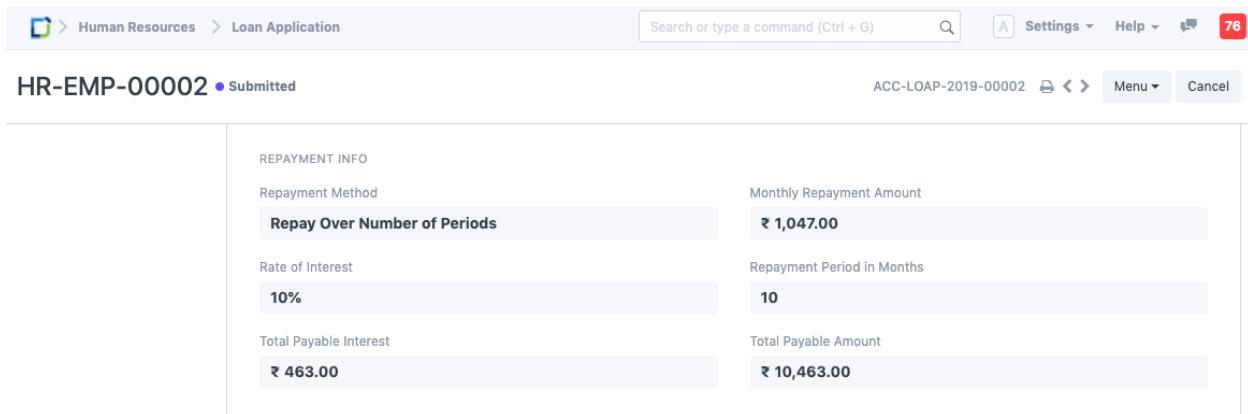
HR-EMP-00001 • Submitted

ACC-LOAP-2019-00001 76

REPAYMENT INFO	
Repayment Method	Monthly Repayment Amount
<b>Repay Fixed Amount per Period</b>	<b>₹ 10,000.00</b>
Rate of Interest	Repayment Period in Months
<b>10%</b>	<b>4</b>
Total Payable Interest	Total Payable Amount
<b>₹ 510.00</b>	<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.



HR-EMP-00002 • Submitted

ACC-LOAP-2019-00002 76

REPAYMENT INFO	
Repayment Method	Monthly Repayment Amount
<b>Repay Over Number of Periods</b>	<b>₹ 1,047.00</b>
Rate of Interest	Repayment Period in Months
<b>10%</b>	<b>10</b>
Total Payable Interest	Total Payable Amount
<b>₹ 463.00</b>	<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

Shared With

You edited this a few seconds ago

You created this 18 hours ago

Applicant Type	Employee	Posting Date	22-08-2019
Applicant	HR-EMP-00001	Company	Unico Plastics Inc.
Applicant Name	George Smith	Status	Sanctioned
Loan Application	ACC-LOAP-2019-00001	Repay from Salary	
Loan Type	Medical		
LOAN DETAILS			
Loan Amount	₹ 30,000.00	Repayment Method	Repay Fixed Amount per Period
Rate of Interest (%) / Year	10%	Repayment Period in Months	4
Repayment Start Date	01-09-2019	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

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"/>	01-09-2019	₹ 9,750.00	₹ 250.00	₹ 10,000.00	₹ 20,250.00
<input type="checkbox"/>	01-10-2019	₹ 9,831.00	₹ 169.00	₹ 10,000.00	₹ 10,419.00
<input type="checkbox"/>	01-11-2019	₹ 9,913.00	₹ 87.00	₹ 10,000.00	₹ 506.00
<input type="checkbox"/>	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

Assigned To: [Assign +](#)

Attachments: [Attach File +](#)

Tags: [Add a tag ...](#)

Reviews: [+ Details](#)

Shared With: [+ Details](#)

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	₹ 10,000.00	₹ 0.00	▼
<input type="checkbox"/>	2 <b>HDFC - UP</b>		₹ 0.00	₹ 10,000.00	▼

---

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

**test\_employee@loan.com** • Submitted

Search or type a command (Ctrl + G)

Sal Slip/EMP-00007/00002 [Print](#) [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...	₹ 13,092.00	₹ 1,960.00	▼
<input type="checkbox"/>	2 <b>ACC-LOAN-2019-...</b>	Loan Account - _TC	Interest Income Acc...	₹ 0.00	₹ 304.87	▼

Total Principal Amount: **₹ 13,092.00**

Total Loan Repayment: **₹ 15,356.87**

Total Interest Amount: **₹ 2,264.87**

## 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.

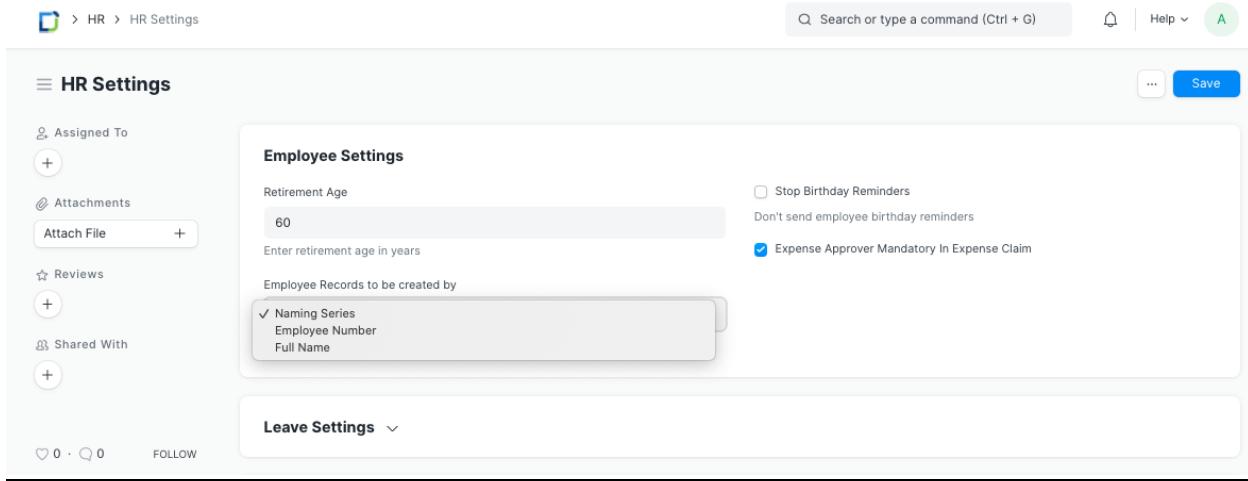
## **HR Settings**

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**



## 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

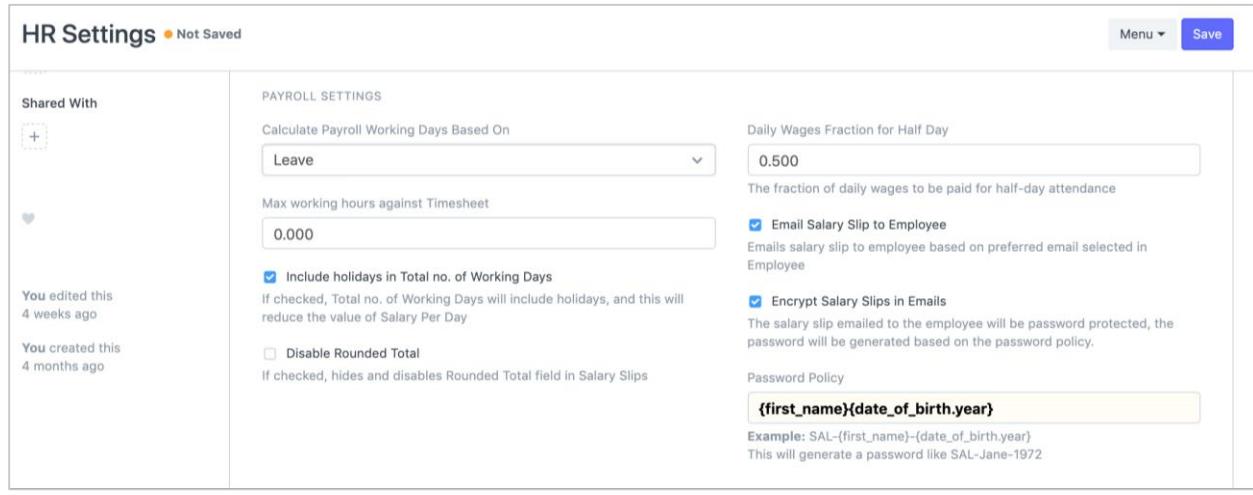
An email is sent to all the employees of the company when an employee has a birthday. To stop this email from being sent you can check this option.

## 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 the following details:

- Shared With:** A list of users who have access to this setting.
- PAYROLL SETTINGS:**
  - Calculate Payroll Working Days Based On:** Set to 'Leave'.
  - Max working hours against Timesheet:** Set to '0.000'.
  - 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:** Set to '0.500'.

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:** A placeholder for a password template: `{first_name}{date_of_birth.year}`

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**

Shift Settings

Allow Multiple Shift Assignments for Same Date

### 3.1 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.

## 4. Leave Settings

HR > HR Settings

Search or type a command (Ctrl + G)

Help ▾ A

≡ HR Settings

...

Save

Leave Settings ▾

Send Leave Notification

Leave Approval Notification Template \*

Leave Approval Notification

Leave Status Notification Template \*

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

### 4.1 Leave Approval Notification Template

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

### 4.2 Leave Status Notification Template

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

#### **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** ^

<input type="checkbox"/> Check Vacancies On Job Offer Creation	<input checked="" type="checkbox"/> Send Interview Feedback Reminder
<input checked="" type="checkbox"/> Send Interview Reminder	Feedback Reminder Notification Template *
Interview Reminder Notification Template *	Interview Feedback Reminder
Interview Reminder	
Remind Before	
00:30:00	

## 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

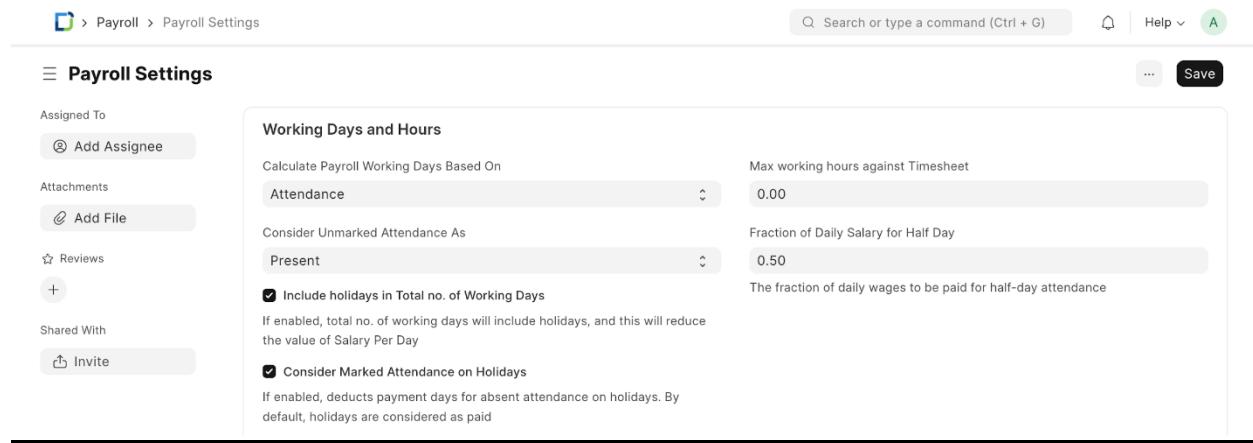
Enabling this will allow Employees to check-in from the mobile app. It is enabled by default.

# 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 with the 'Working Days and Hours' section selected. The left sidebar includes buttons for 'Assigned To', 'Attachments', 'Reviews', and 'Shared With'. The main content area has the following configuration:

- Calculate Payroll Working Days Based On:** Attendance (dropdown menu)
- Max working hours against Timesheet:** 0.00
- Consider Unmarked Attendance As:** Present (dropdown menu)
- Fraction of Daily Salary for Half Day:** 0.50
- Include holidays in Total no. of Working Days:**  (checkbox) - If enabled, total no. of working days will include holidays, and this will reduce the value of Salary Per Day.
- Consider Marked Attendance on Holidays:**  (checkbox) - If enabled, deducts payment days for absent attendance on holidays. By default, holidays are considered as paid.

### 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

Disable Rounded Total

If checked, hides and disables Rounded Total field in Salary Slips

Show Leave Balances in Salary Slip

## 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

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.

### **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**

#### Define Opening Balance for Earning and Deductions

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)

#### Process Payroll Accounting Entry based on Employee

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' page in the ERPNext application. The top navigation bar includes 'Tax & Benefits' and 'Salary Structure Assignment' with the identifier 'HR-SSA-23-02-00001'. The search bar says 'Search or type a command (Ctrl + G)'. The right side has a help icon and a user profile.

The main content area is for 'Rucha Mahabal' (Submitted). On the left, there are sidebar buttons for 'Assigned To', 'Attachments' (with 'Attach File'), 'Reviews' (with '+'), 'Shared With' (with '+'), 'Tags' (with '+'), and 'Follow' (0). Below these are notifications: 'You edited this just now' and 'You created this just now'.

The main form fields are:

- 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
- Currency:** INR
- Designation:** Engineer

**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

At the bottom, there is a 'Payroll Cost Centers' dropdown.

## 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.

Payroll Payable - FT • Journal Entry

Assigned To: +

Attachments: Attach File +

Shared With: +

Tags: Add a tag ...

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	Actions
1	HRA - FT			₹ 72,400.00	₹ 0.00	<input type="button" value="Edit"/>
2	SA - FT			₹ 1,44,800.00	₹ 0.00	<input type="button" value="Edit"/>
3	Basic - FT			₹ 1,44,800.00	₹ 0.00	<input type="button" value="Edit"/>
4	TDS on Salary - FT			₹ 0.00	₹ 67,859.00	<input type="button" value="Edit"/>
5	Professional Tax - FT			₹ 0.00	₹ 400.00	<input type="button" value="Edit"/>
6	Provident Fund - FT			₹ 0.00	₹ 3,600.00	<input type="button" value="Edit"/>
7	Payroll Payable - FT	Employee	HR-EMP-00001	₹ 0.00	₹ 1,41,512.00	<input type="button" value="Edit"/>
8	Payroll Payable - FT	Employee	HR-EMP-00002	₹ 0.00	₹ 1,48,629.00	<input type="button" value="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:

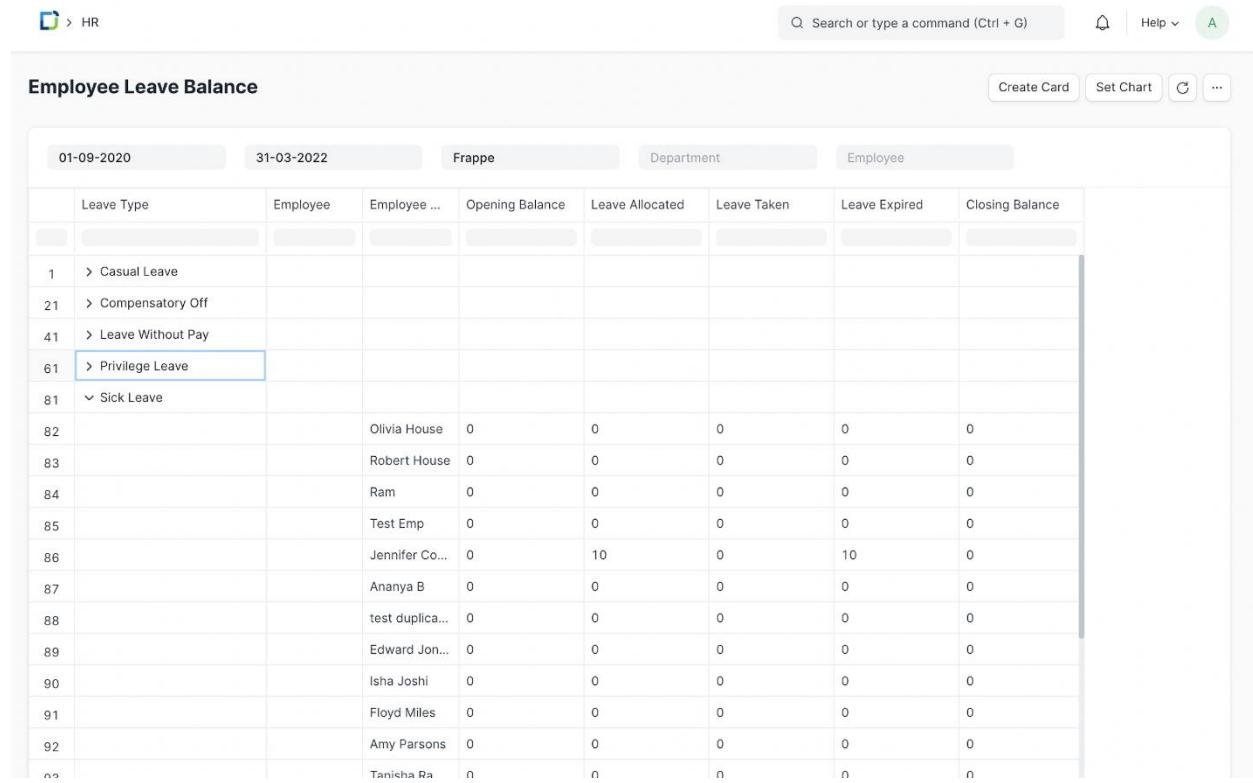
1. If no Holiday List is selected, then the email will be sent every day. >2. Name of the "Daily Work Summary Group" will be sent as the title for daily summary email. >3. Mail will not be sent to the users of a disabled Daily Work Summary Group.



# Reports

# Human Resources Reports

## 1. Employee Leave Balance



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	▼ Sick Leave							
82		Olivia House	0	0	0	0	0	0
83		Robert House	0	0	0	0	0	0
84		Ram	0	0	0	0	0	0
85		Test Emp	0	0	0	0	0	0
86		Jennifer Co...	0	10	0	10	0	0
87		Ananya B	0	0	0	0	0	0
88		test duplica...	0	0	0	0	0	0
89		Edward Jon...	0	0	0	0	0	0
90		Isha Joshi	0	0	0	0	0	0
91		Floyd Miles	0	0	0	0	0	0
92		Amy Parsons	0	0	0	0	0	0
93		Tanisha Ra	0	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

...

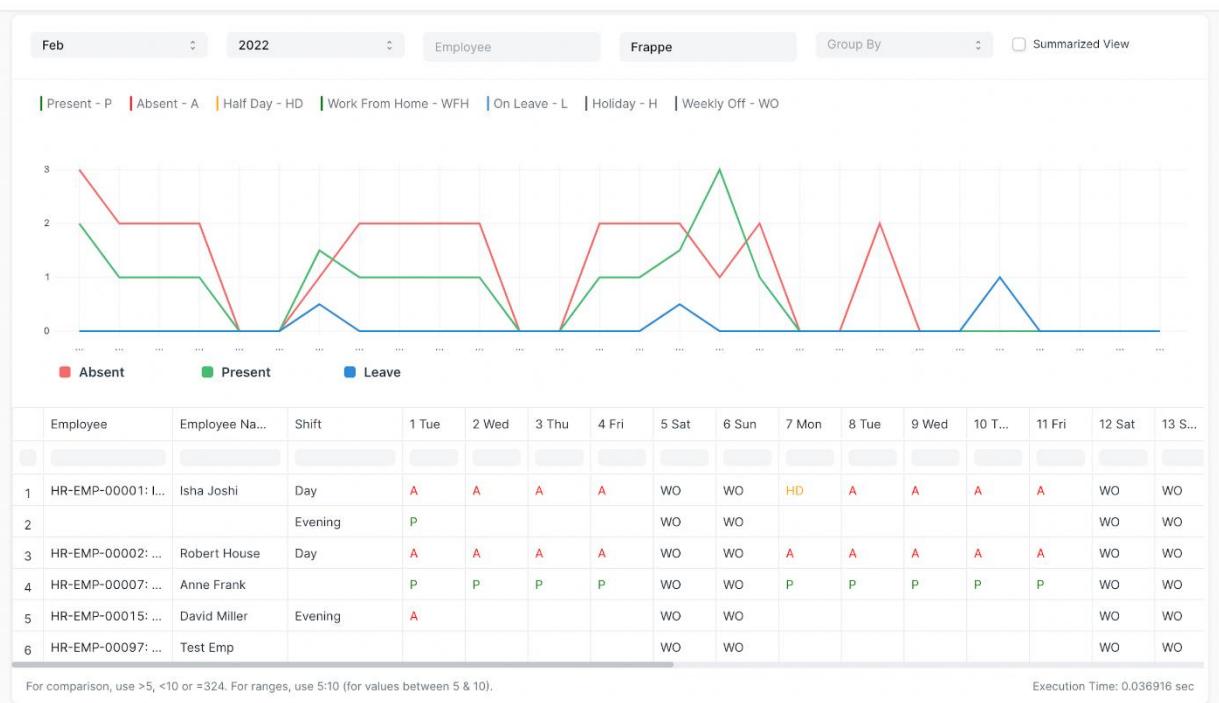
01-05-2021		07-12-2021		INR		Employee	Frappe		Submitted			
Employee	Employee Name	Date o...	B...	D...	Designation	Company	Start D...	End Da...	L...	Payment Days	Basic	Professional ...
-0...	HR-EMP-0000...	Robert House	2020-0...			Frappe	2021-0...	2021-0...	0.000	1.000	₹ 20,000.00	₹ 4,600.00
-0...	HR-EMP-0009...	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 &gt;5, &lt;10 or =324. For ranges, use 5:10 (for values between 5 &amp; 10).

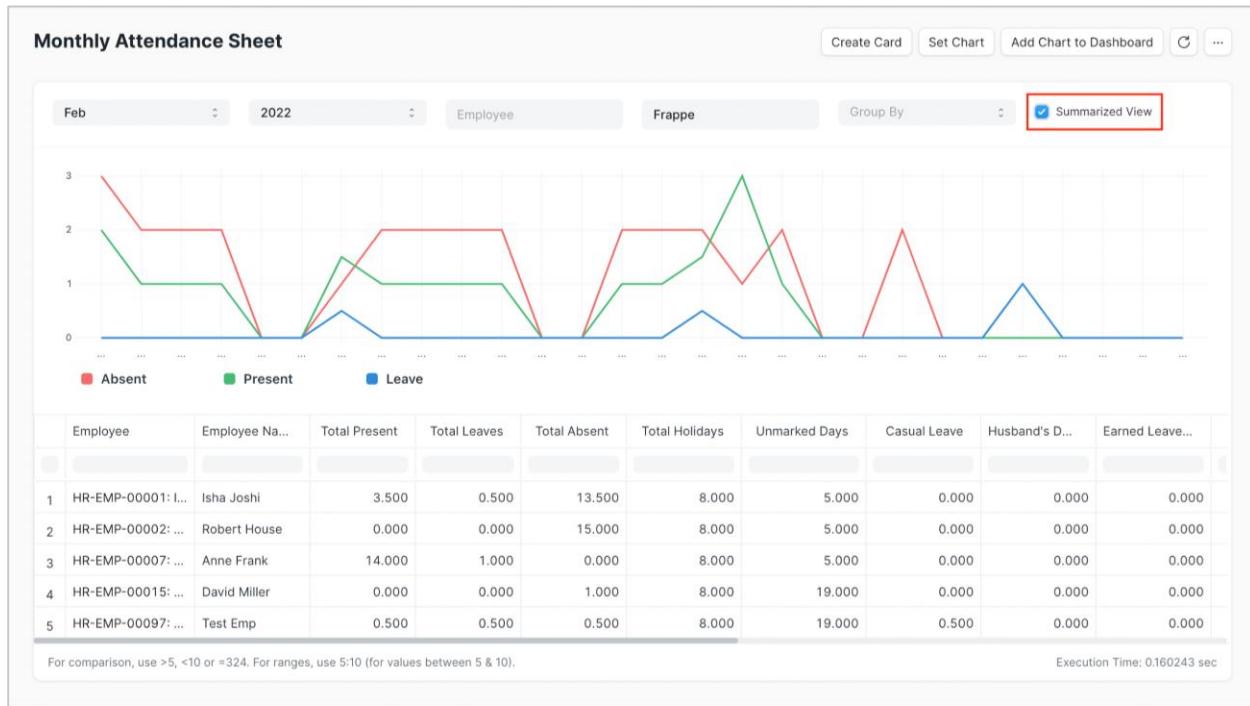
Execution Time: 0.005939 sec

## 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

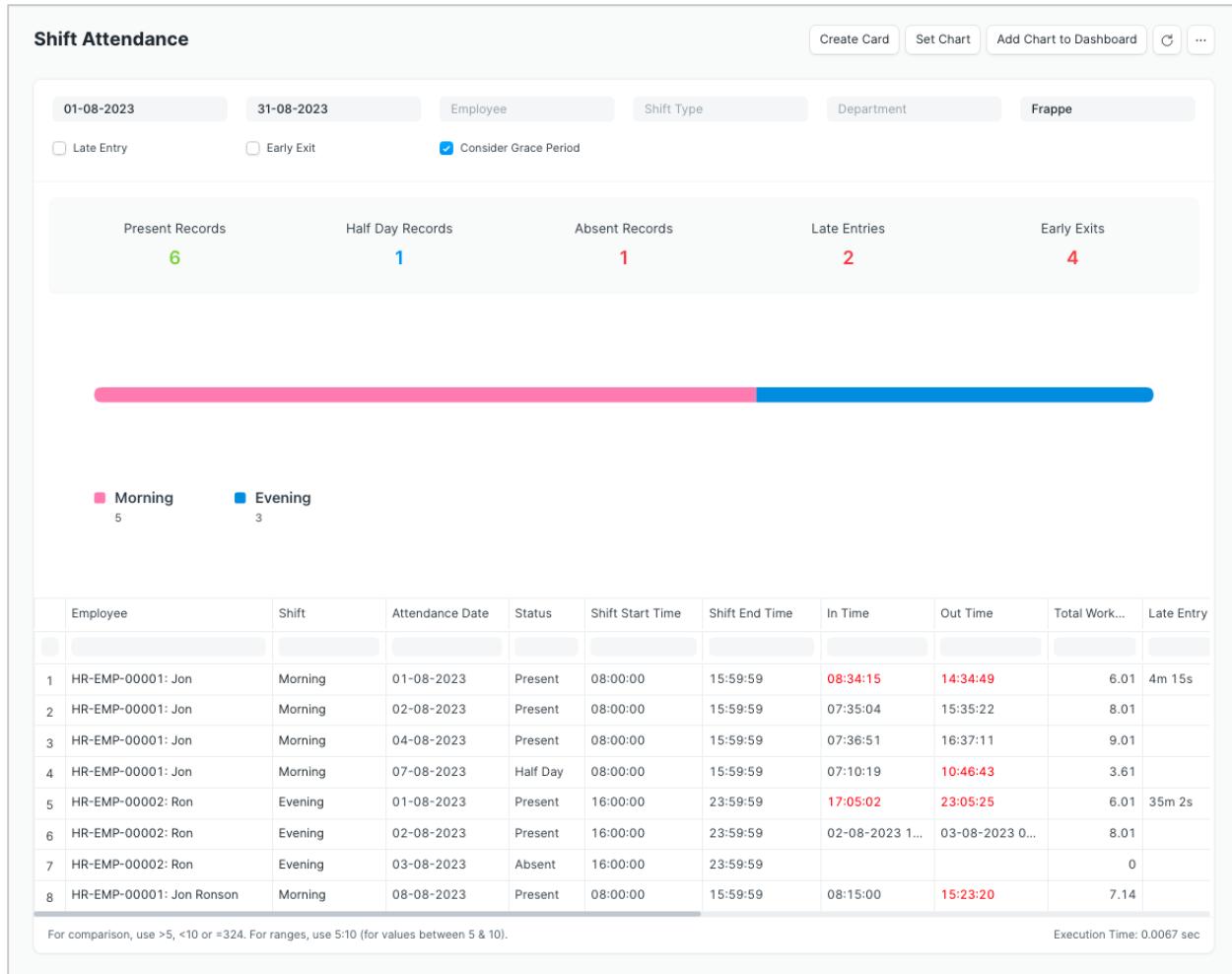
Introduced in Version 15

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

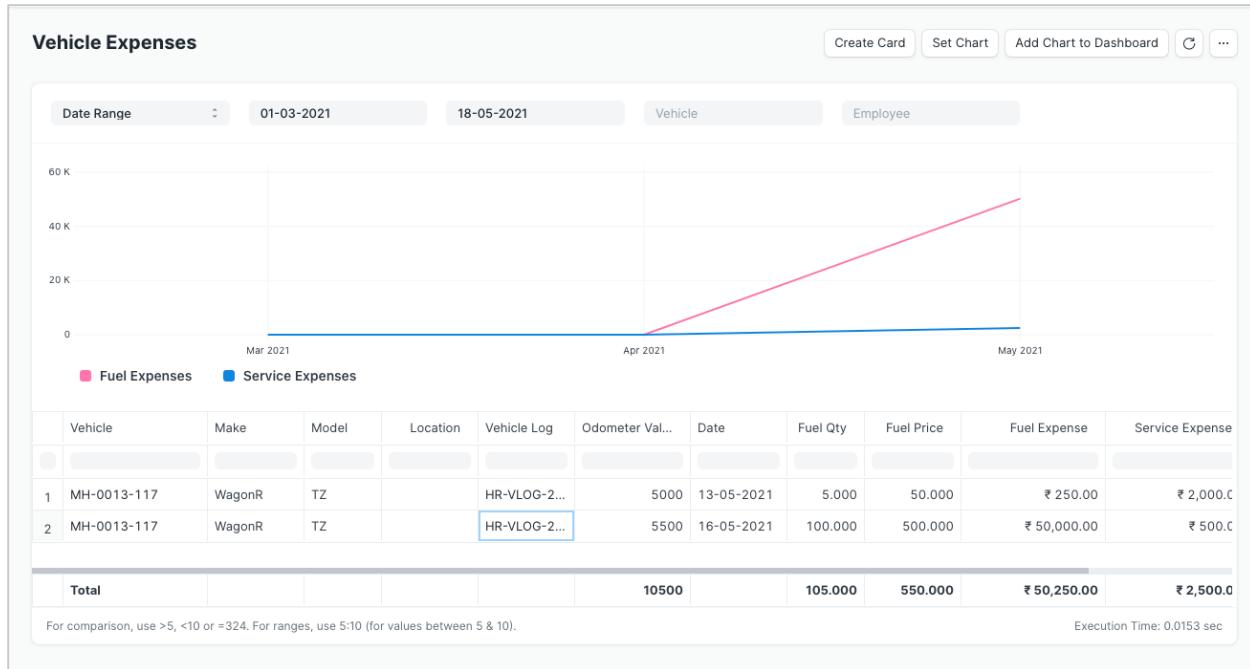
Entries can be further filtered on the basis of:

- 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:

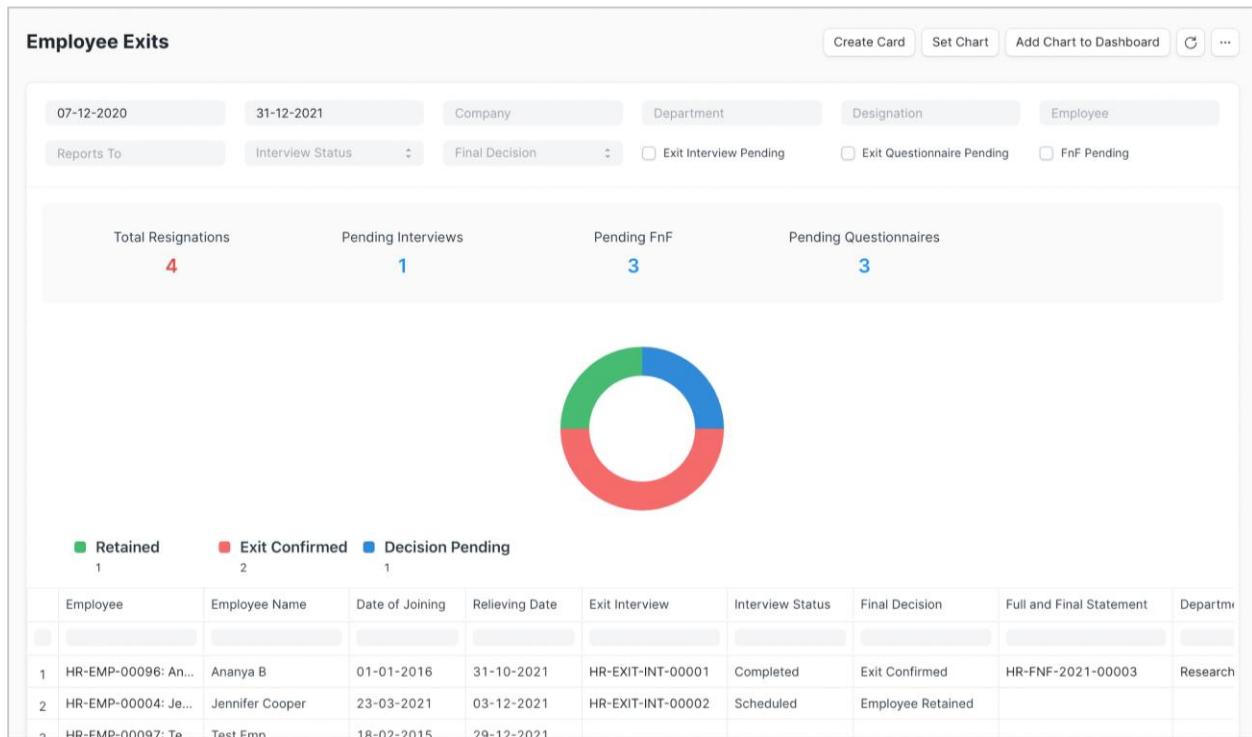
- Employee Details: Employee, Reports to, Date of Joining, Relieving Date, Department, Designation
- Exit Interview
- Interview Status (Pending/Scheduled/Completed)
- Final Decision (Employee Retained/Exit Confirmed)
- Full and Final Statement

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.

The dashboard has the following filters:

- Dec
- Frappe

Table data:

	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					<a href="#">Create Card</a>	<a href="#">Set Chart</a>		
		01-01-2021	31-12-2021	Holiday List				
	Employee	Name	Date	Status	Holiday			
1	HR-EMP-00006	Agatha	28-03-2021	On Leave	Sunday			
2	HR-EMP-00006	Agatha	03-04-2021	On Leave	Saturday			
3	HR-EMP-00006	Agatha	04-04-2021	On Leave	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 company(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

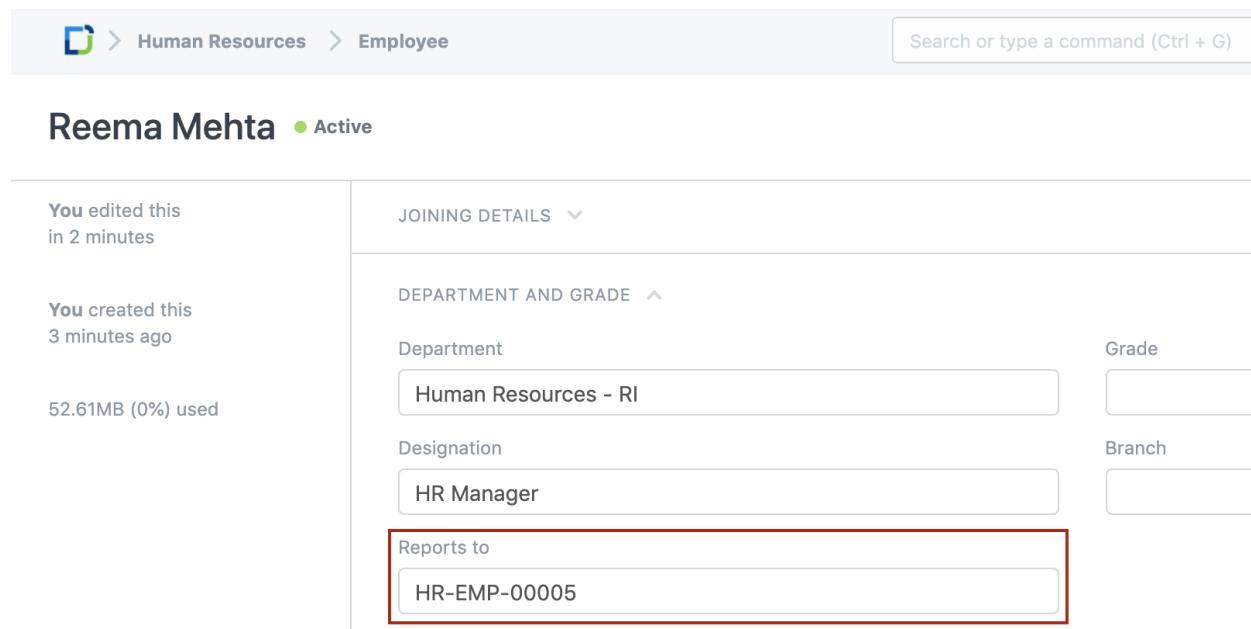
# User Permission based on Hierarchy

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.



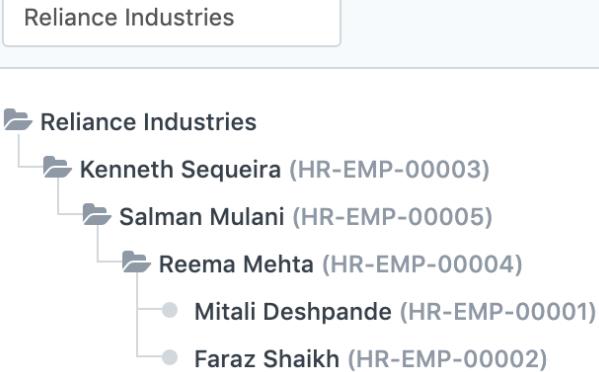
The screenshot shows the Employee master record for Reema Mehta. The top navigation bar shows 'Human Resources > Employee'. The search bar on the right contains the placeholder 'Search or type a command (Ctrl + G)'. The employee details are as follows:

- 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
- Grade: (empty)
- Branch: (empty)
- Reports to** (highlighted with a red box): HR-EMP-00005

## Employee Hierarchy

Also, one 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



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**

Comments 0	
ASSIGNED TO	User <b>kenneth@relianceind.test</b>
Assign +	
ATTACHMENTS	Allow <b>Employee</b>
Attach File +	
TAGS	For Value <b>HR-EMP-00003</b>
Add a tag ...	
SHARED WITH	ADVANCED CONTROL
[+]	<input checked="" type="checkbox"/> Apply To All Document Types
♥	

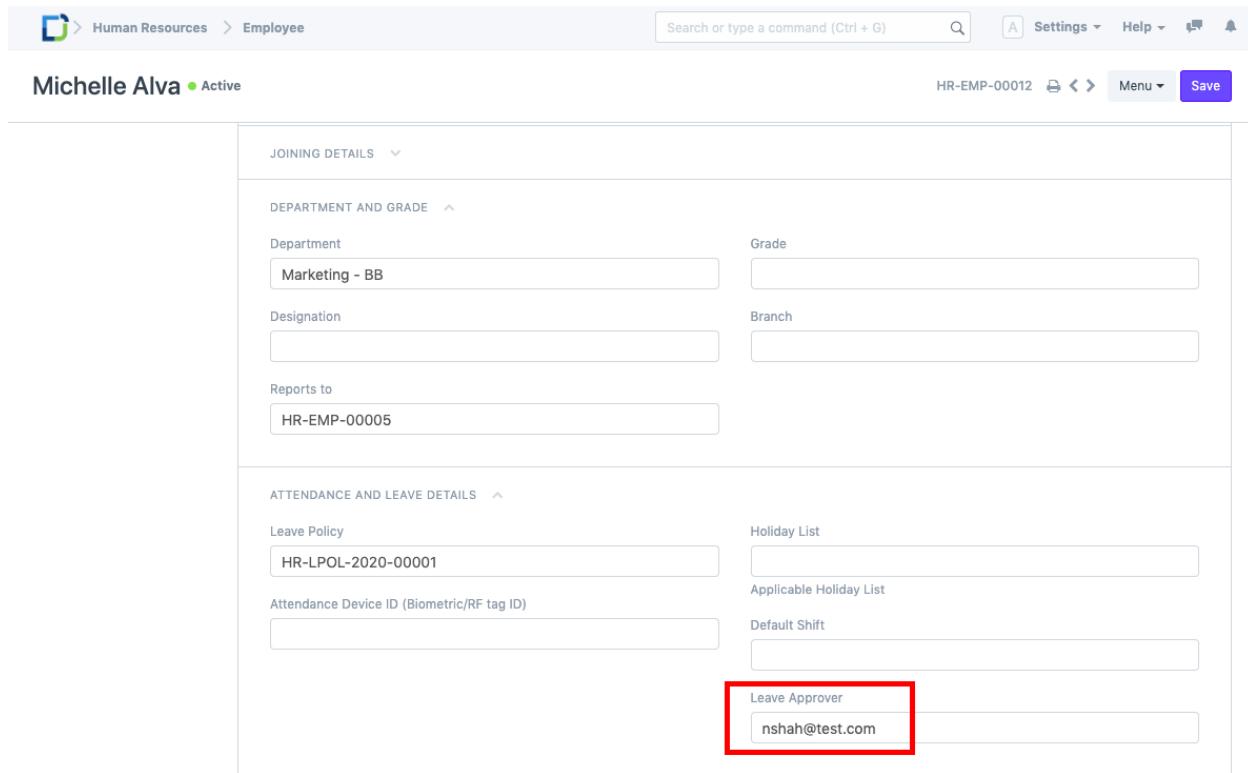
Can you please ensure that seniors Employee ID is updated as Reports To in the Employee's who report to him/her? After that, manager should be able to view the Expense Claims and other documents (like Leave Application, Appraisal etc.) made for his/her sub-ordinates.

## 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.



Michelle Alva • Active

HR-EMP-00012

JOINING DETAILS

DEPARTMENT AND GRADE

Department: Marketing - BB

Designation:

Reports to: HR-EMP-00005

Grade:

Branch:

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:

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
Tags
Reviews
Shared With

Employee

Leave Type

Employee Name

Leave Balance Before Application

From Date

Reason

To Date

Half Day

Total Leave Days

Leave Approver

Status

Leave Approver Name

Salary Slip

Posting Date

Company

Follow via Email

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
Save

Comments 0

Assigned To

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Reviews

+  

Shared With

+

Department

Parent Department

Company

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

	Approver
<input type="checkbox"/>	simran@iwebnotes.com
<input type="checkbox"/>	1

leave approver set for this department

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-EMP-00012

Casual Leave

Employee Name: Michelle Alva

Leave Balance Before Application: 11

From Date: 23-01-2020

To Date: 24-01-2020

Reason: (empty)

Half Day:

Total Leave Days: 2

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: (empty)

Company: Blue Bird

Letter Head: Berkey Creamery

Color: (empty)

## 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

Document Type	Role	Level	Permissions
Department	Leave Approver	0	<input checked="" type="checkbox"/> Read <input type="checkbox"/> Write <input type="checkbox"/> Create <input type="checkbox"/> Delete <input type="checkbox"/> Print <input type="checkbox"/> Email <input type="checkbox"/> Report <input type="checkbox"/> Import <input checked="" type="checkbox"/> Export <input type="checkbox"/> Set User Permissions <input type="checkbox"/> Share

2. Create the user in DellSuite with Role as "Leave Approver", and Employee In our example, this is Chris.

Chris • Active

ERPNEXT USER

User ID: chris@abx.in

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.

3. Now, create the necessary user permissions as per Company, Department, and Employee.

User Permission					Menu ▾	Refresh	New			
Reports ▾					Add / Update Bulk Delete					
	ID	Search	Allow	For Value						
	Add Filter									
	Last Modified On	▼								
	Allow	For Value	Applicable For			2 of 2				
	Company	SX4	6796375d84	19 m	<input type="checkbox"/>	0				
TAGS	Department	Research & Develop...	2da3357eb3	22 m	<input type="checkbox"/>	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

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.

	Approver
<input type="checkbox"/>	
<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

You created this 4 months ago	JOINING DETAILS		
70.88MB (0%) used	DEPARTMENT AND GRADE		
	Department <b>Research &amp; Development - S4</b>	Grade	
	Designation	Branch	
	Reports to		

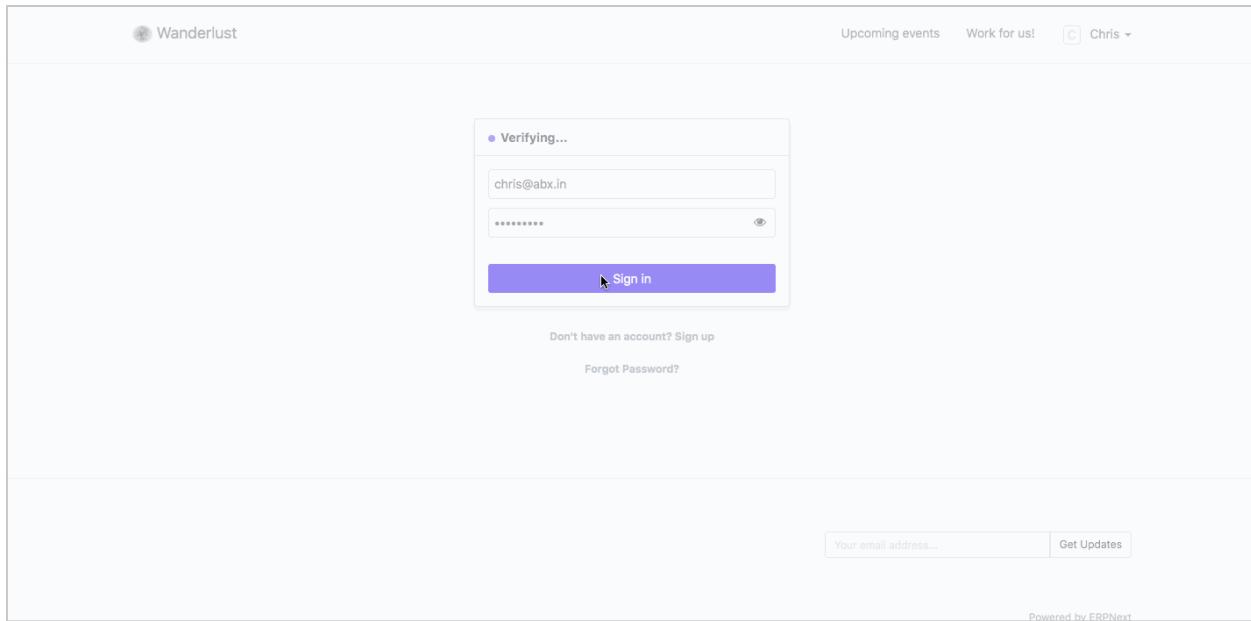
6. Pepper fills in a leave application.

Pepper • Draft

HR-LAP-2019-00007 Menu

Comments 0	Employee <b>HR-EMP-00004</b>	Leave Type <b>Sick Leave</b>
ASSIGNED TO Assign +	Employee Name <b>Pepper</b>	Department <b>Research &amp; Development - S4</b>
ATTACHMENTS Attach File +	Leave Balance Before Application <b>3</b>	
TAGS Add a tag ...	From Date <b>04-07-2019</b>	Reason
SHARED WITH 	To Date <b>05-07-2019</b>	
	<input type="checkbox"/> Half Day	
You edited this 14 minutes ago	Total Leave Days <b>2</b>	
You created this 15 minutes ago	Leave Approver <b>chris@abx.in</b>	Status <b>Open</b>
70.88MB (0%) used	Leave Approver Name <b>Chris</b>	Salary Slip

7. When the Leave Approver, Chris, logins, he can only access the leaves raised by employees of his department.



8. Meanwhile, when we login via System Manager, there are few other Leave Applications in the list, too.

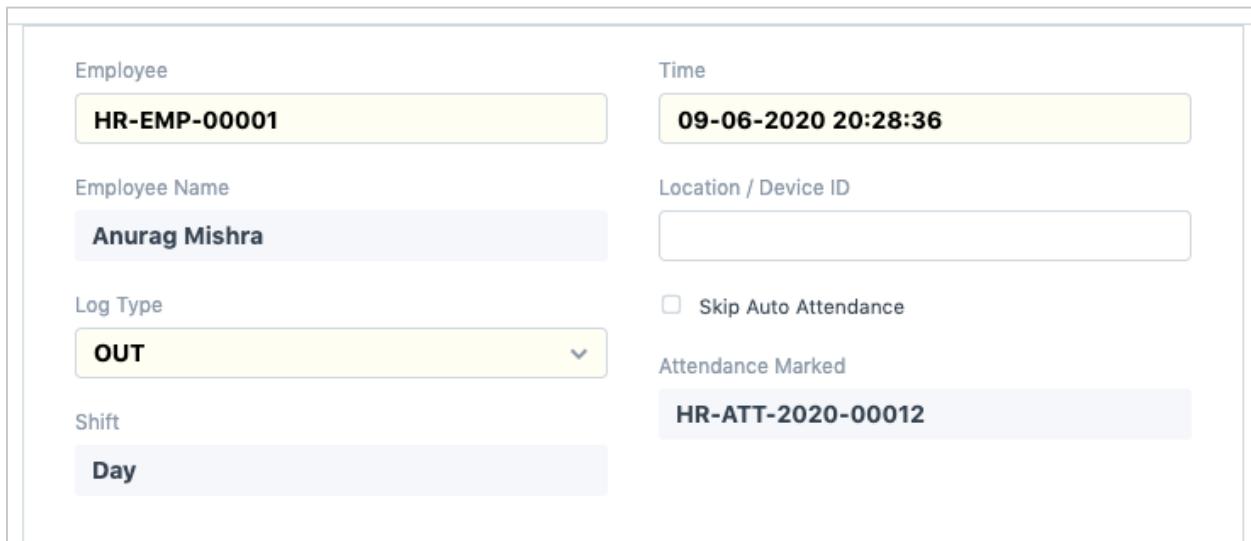
Leave Application							Menu ▾	Refresh	New
Reports ▾ List Gantt Calendar ▾ Kanban ▾ Assigned To Me  SAVE FILTER Filter Name	ID	Employee	Leave Type	From Date	To Date				
	Add Filter				Last Modified On				
	<input type="checkbox"/> ❤ Employee Name		Status	From Date	Total Leave Days	6 of 6			
	<input type="checkbox"/> ❤ Pepper		● Approved	04-07-2019	2	₹-LAP-2019-00007	13 m	<input type="button"/>	0
	<input type="checkbox"/> ❤ Bernard		● Draft	03-07-2019	3	₹-LAP-2019-00006	42 m	<input type="button"/>	0
	<input type="checkbox"/> ❤ Bernard		● Approved	07-06-2019	2	₹-LAP-2019-00005	1M	<input type="button"/>	0
	<input type="checkbox"/> ❤ Peninah		● Approved	17-05-2019	1	₹-LAP-2019-00004	2 M	<input type="button"/>	0
	<input type="checkbox"/> ❤ Peninah		● Approved	13-05-2019	3	₹-LAP-2019-00002	2 M	<input type="button"/>	0
	<input type="checkbox"/> ❤ Pepper		● Approved	22-04-2019	1	₹-LAP-2019-00001	2 M	<input type="button"/>	0

PS. We have assumed that the reader knows how to manage different leaves and allocations in DellSuite.

# Using Auto Attendance

DellSuite allows us to Mark Attendance automatically depending upon the Employee Checkin records.

A. Create or import Employee Checkin:



The form displays the following data:

Employee	HR-EMP-00001	Time	09-06-2020 20:28:36
Employee Name	Anurag Mishra	Location / Device ID	
Log Type	OUT	<input type="checkbox"/> Skip Auto Attendance	
Shift	Day	Attendance Marked	HR-ATT-2020-00012

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

<p>Start Time <b>10:45:26</b></p> <p>End Time <b>20:45:26</b></p>	<p>Holiday List <b>Holiday 2020</b></p> <p><input checked="" type="checkbox"/> Enable Auto Attendance Mark attendance based on 'Employee Checkin' for Employees assigned to this shift.</p>
<p><b>AUTO ATTENDANCE SETTINGS</b></p> <p>Determine Check-in and Check-out <b>Alternating entries as IN and OUT during the shift</b></p> <p>Working Hours Calculation Based On <b>First Check-in and Last Check-out</b></p> <p>Begin check-in before shift start time (in minutes) <b>60</b></p> <p>The time before the shift start time during which Employee Check-in is considered for attendance.</p> <p>Allow check-out after shift end time (in minutes) <b>60</b></p> <p>Time after the end of shift during which check-out is considered for attendance.</p>	
<p>Working Hours Threshold for Half Day <b>3.0</b></p> <p>Working hours below which Half Day is marked. (Zero to disable)</p> <p>Working Hours Threshold for Absent <b>1.0</b></p> <p>Working hours below which Absent is marked. (Zero to disable)</p> <p>Process Attendance After <b>01-06-2020</b></p> <p>Attendance will be marked automatically only after this date.</p> <p>Last Sync of Checkin <b>09-06-2020 22:00:27</b></p> <p>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.</p>	

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

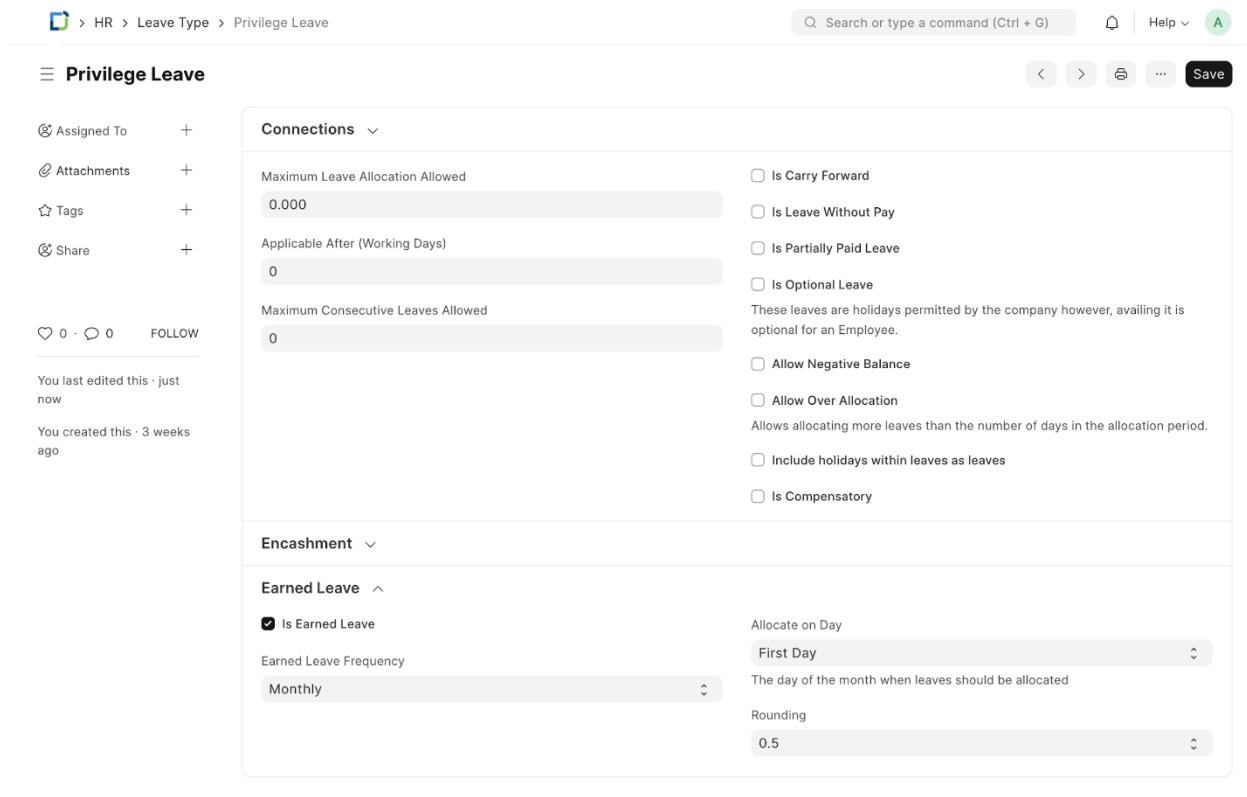
Note: The scheduler will run the process to mark attendance automatically every hour. But after uploading or creating check-ins you need to check your Process Attendance After and Last Sync of Checkin in Shift Type.

## Configuring Earned Leave

### 1. Prerequisites

Before configuring Earned Leaves, it is required that you create the following first:

- Leave Type



The screenshot shows the 'Privilege Leave' configuration page. The top navigation bar includes 'Search or type a command (Ctrl + G)', 'Help', and a save button. The left sidebar has sections for 'Assigned To', 'Attachments', 'Tags', 'Share', and social sharing. The main content area is divided into sections: 'Connections', 'Encashment', and 'Earned Leave'. The 'Connections' section contains fields for 'Maximum Leave Allocation Allowed' (0.000), 'Applicable After (Working Days)' (0), 'Maximum Consecutive Leaves Allowed' (0), and several checkboxes for leave types: 'Is Carry Forward', 'Is Leave Without Pay', 'Is Partially Paid Leave', 'Is Optional Leave', 'Allow Negative Balance', 'Allow Over Allocation', 'Include holidays within leaves as leaves', and 'Is Compensatory'. The 'Encashment' section includes 'Allocate on Day' (set to 'First Day'), 'The day of the month when leaves should be allocated', and 'Rounding' (set to '0.5'). The 'Earned Leave' section includes a checkbox 'Is Earned Leave' (checked), 'Earned Leave Frequency' (set to 'Monthly'), and 'Allocate on Day' (set to 'First Day').

- Leave Period

HR > Leave Period > HR-LPR-2023-00001

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

**HR-LPR-2023-00001**

Assigned To: +

Attachments: +

Tags: +

Share: +

Connections:

From Date \*: 01-01-2024

To Date \*: 31-12-2024

Company \*: Frappe

Holiday List for Optional Leave

Is Active

0 · 0 FOLLOW

## ● Leave Policy

HR > Leave Policy > HR-LPOL-2023-00001

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

**Leave Policy 2024** Submitted

Assigned To: +

Attachments: +

Tags: +

Share: +

Connections:

Title \*: Leave Policy 2024

Leave Allocations

Leave Policy Details

No.	Leave Type *	Annual Allocation *
1	Privilege Leave	22 <span>✓ Edit</span>

0 · 0 FOLLOW

You last edited this · just now

## ● Leave Policy Assignment

HR > Leave Policy Assignment > HR-LPOL-ASSGN-00001

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

**Akash** Submitted

Assigned To: +

Attachments: +

Tags: +

Share: +

Connections:

Employee \*: HR-EMP-0001

Employee name: Akash

Company: Frappe

Leave Policy \*: HR-LPOL-2023-00001

Assignment based on: Leave Period

Leave Period: HR-LPR-2023-00001

Effective From \*: 01-01-2024

Effective To \*: 31-12-2024

Add unused leaves from previous allocations

0 · 0 FOLLOW

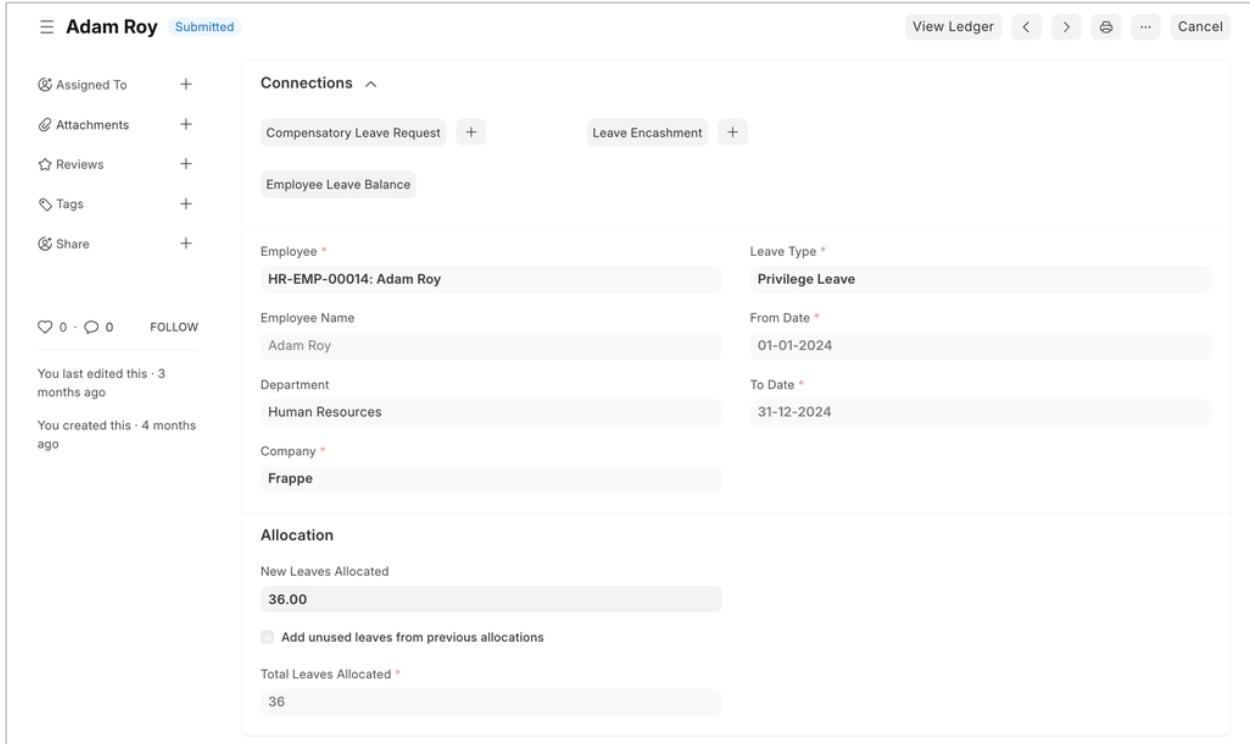
You last edited this · just now

You created this · just now

## 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 shows the Frappe Leave Allocation form for an employee named Adam Roy. The form is titled 'Adam Roy' and is marked as 'Submitted'. On the left, there is a sidebar with various buttons for 'Assigned To', 'Attachments', 'Reviews', 'Tags', and 'Share'. Below this are social sharing icons for '0' likes and '0' comments, and a 'FOLLOW' button. A note indicates the record was last edited 3 months ago and created 4 months ago. The main content area is divided into sections: 'Connections' (with 'Compensatory Leave Request' and 'Leave Encashment' buttons), 'Employee Leave Balance' (with a table showing 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), and 'Allocation' (with a table showing New Leaves Allocated: 36.00, Total Leaves Allocated: 36, and a checkbox for 'Add unused leaves from previous allocations').

## 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: Payment Days = Working Days - 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.

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

**Casual Leave**

**Encashment**

Allow Encashment

Encashment Threshold Days: 10

Earning Component: Leave Encashment

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'.

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

**HR-LPOL-ASSGN-00001** • Submitted

**Assigned To**

**Connections**

Leaves (2 Leave Allocation)

**Employee \***: HR-EMP-00001: Vrinda A Menon

**Assignment based on**: Joining Date

**Employee name**: Vrinda A Menon

**Effective From \***: 06-08-2020

**Company**: Popcorn Ltd

**Effective To \***: 06-08-2021

**Leave Policy \***: HR-LPOL-2021-00001

Add unused leaves from previous allocations

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.

≡ vrinda's SS • Submitted

Preview Salary Slip Assign Salary Structure Assign to Employees < > ⌂ ... Cancel

Assigned To

Attachments Attach File +

Reviews +

Shared With +

Tags Add a tag ...

0 · 0 FOLLOW

Company \* Popcorn Ltd Is Active \* Yes

Payroll Frequency \* Monthly

Currency \* INR

Salary Slip Based on Timesheet Leave Encashment Amount Per Day (INR) ₹ 200.00

You edited this 5 minutes ago

You created this 5 minutes ago

#### 4. Assign the Salary Structure to the same Employee.

≡ Vrinda A Menon • Submitted

Assigned To

Attachments Attach File +

Reviews +

Shared With +

Tags Add a tag ...

Employee \* HR-EMP-00001: Vrinda A Menon Salary Structure \* vrinda's SS

Employee Name Vrinda A Menon From Date \* 17-08-2020

Company \* Popcorn Ltd Income Tax Slab New Tax Regime 2021-22

Payroll Payable Account Payroll Payable - PL Currency \* INR

#### 5. Create a Leave Encashment and make sure that the date you create the Leave Encashment falls between the 'From Date' and 'To Date' in the Leave Allocation.

HR > Leave Encashment > HR-ENC-2021-00002

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

**HR-ENC-2021-00002** • Submitted

**Assigned To**

Leave Period \*: HR-LPR-2021-00001

Leave Type \*: Casual Leave

**Attachments**

Employee \*: HR-EMP-00001: Vrinda A Menon

Leave Allocation: HR-LAL-2021-00001

Employee Name: Vrinda A Menon

Leave Balance: 20

Company \*: Popcorn Ltd

Encashable days: 10

**Reviews**

**Shared With**

**Tags**

0 · 0 FOLLOW

You edited this 9 minutes ago

You created this 9 minutes ago

**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 | Cancel

**Assigned To**

**Attachments**

**Reviews**

**Shared With**

**Tags**

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.

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.]

Prajakta • Present

Comments 0

Assigned To

Attachments

Tags

Reviews

Shared With

Employee Checkin +

Employee: HR-EMP-00007: Prajakta

Attendance Date: 12-01-2020

Employee Name: Prajakta

Company: Conner Industries

Status: Present

Late Entry

Early Exit

Add a comment

Comment

You edited this 7 minutes ago

You created this 7 minutes ago

67.39MB (0%) used

Ctrl+Enter to add comment

3) Create a Leave allocation for the Employee.

4) In the Leave Type list, for all the types that allow Compensatory off, tick the checkbox.

Privilege Leave

Comments 0

Assigned To

Attachments

Tags

Reviews

Shared With

Leave Allocation 4 +

Leave Application 2 +

Attendance 1 +

Leave Encashment +

Max Leaves Allowed: 15

Applicable After (Working Days): 0

Maximum Continuous Days Applicable: 0

CARRY FORWARD

ENCASHMENT

EARNED LEAVE

Is Carry Forward

Is Leave Without Pay

Is Optional Leave

Allow Negative Balance

Include holidays within leaves as leaves

Is Compensatory

Add a comment

5) Now, create a Compensatory Leave Request for the employee.

Prajakta • Submitted

HR-CMP-20-01-00002

Comments 0	Employee <b>HR-EMP-00007: Prajakta</b>	Leave Type <b>Privilege Leave</b>
Assigned To Assign +	Employee Name <b>Prajakta</b>	
Attachments Attach File +		
Tags Add a tag ...	WORKED ON HOLIDAY	
Reviews +	Work From Date <b>12-01-2020</b>	Reason <b>Test</b>
Shared With +	Work End Date <b>12-01-2020</b>	
		<input type="checkbox"/> Half Day
Followed by M Unfollow	Add a comment  Comment	
You edited this 3 minutes ago	Ctrl+Enter to add comment	
You created this 4 minutes ago		

6) Go back and check the Leave allocation for the leave added for the Employee.

HR-LAL-2020-00001-2 • Submitted

HR-LAL-2020-00001-2

Comments 0	DASHBOARD	
Assigned To Assign +	Compensatory Leave Request	
Attachments Attach File +	Leave Encashment	
Tags Add a tag ...	Employee <b>HR-EMP-00007: Prajakta</b>	
Reviews +	Leave Type <b>Privilege Leave</b>	
Shared With +	Employee Name <b>Prajakta</b>	
	From Date <b>16-01-2020</b>	
	To Date <b>31-05-2020</b>	
Followed by M Unfollow	ALLOCATION	
You edited this 2 minutes ago	New Leaves Allocated <b>7</b>	Amended From <b>HR-LAL-2020-00001-1</b>
You created this 4 minutes ago	Add unused leaves from previous allocations	
67.39MB (0%) used	Total Leaves Allocated <b>7</b>	

# 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.

New Taxation
Draft

**Assigned To**

Assign +

**Attachments**

Attach File +

**Tags**

Add a tag ...

**Reviews**

**Shared With**

You edited this 11 minutes ago

You created this 1 week ago

11690.92MB (76%) used

**Effective from**

**01-04-2020**

**Company**

HR

**Allow Tax Exemption**  
If enabled, Tax Exemption Declaration will be considered for income tax calculation.

**Disabled**

**TAXABLE SALARY SLABS**

**Taxable Salary Slabs**

	From Amount	To Amount	Percent Deduction	Condition
<input type="checkbox"/>	₹ 0.00	₹ 2,50,000.00	0%	
<input type="checkbox"/>	₹ 2,50,001.00	₹ 5,00,000.00	5%	annual_taxable_earning > 500000
<input type="checkbox"/>	₹ 5,00,001.00	₹ 10,00,000.00	20%	
<input type="checkbox"/>	₹ 10,00,001.00	₹ 0.00	30%	

**Add Row**

**TAXES AND CHARGES ON INCOME TAX**

**Other Taxes and Charges**

	Description	Percent	Min Taxable Income	Max Taxable Income
<input type="checkbox"/>	Education Cess	4%	₹ 0.00	₹ 0.00

**Add Row**

### 3) Submit Employee Tax Exemption Declaration

An employee who has some investments can submit tax declarations to avail tax benefits and thus can reduce their Income Tax amount. They can invest in various sub categories under 80C, 80D, etc. (Applicable for Indian Taxation).

### 4) Define Salary Components

You can create salary components and define whether the component is an Earning or a Deduction component. There are certain checkboxes that you can check depending on the component type. Select the company and a default ledger account. Now, these salary components can be based on a particular formula or it can be a fixed amount. Only for Income Tax component you need to check a particular checkbox called "Variable based on Taxable Salary". This will ensure that the Income Tax is calculated automatically in the backend.

## 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						
	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						
	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

Comments 0

Assigned To

Attachments

Tags

Reviews

Shared With

Employee **EMP/0003: Shiv**

Employee Name **Shiv**

Company **HR**

Base **₹ 50,000.00**

Salary Structure **Training 1**

From Date **01-04-2020**

Income Tax Slab **Old regime**

Variable **₹ 0.00**

HR-SSA-20-06-00003

## 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

Comments 0

Assigned To

Attachments

Tags

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
1	EMP/00012: Kenneth	Kenneth	Human Resources -...	Software Developer
2	EMP/0001: Reema Mehta	Reema Mehta	Human Resources -...	HR Manager
3	EMP/0003: Shiv	Shiv	Human Resources -...	

Submit Salary Slip

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.

Payroll 0018 • Submitted

Comments 0

Assigned To

Attachments

Tags

DASHBOARD

Salary Slip 3 (3) +

Journal Entry +

Confirm

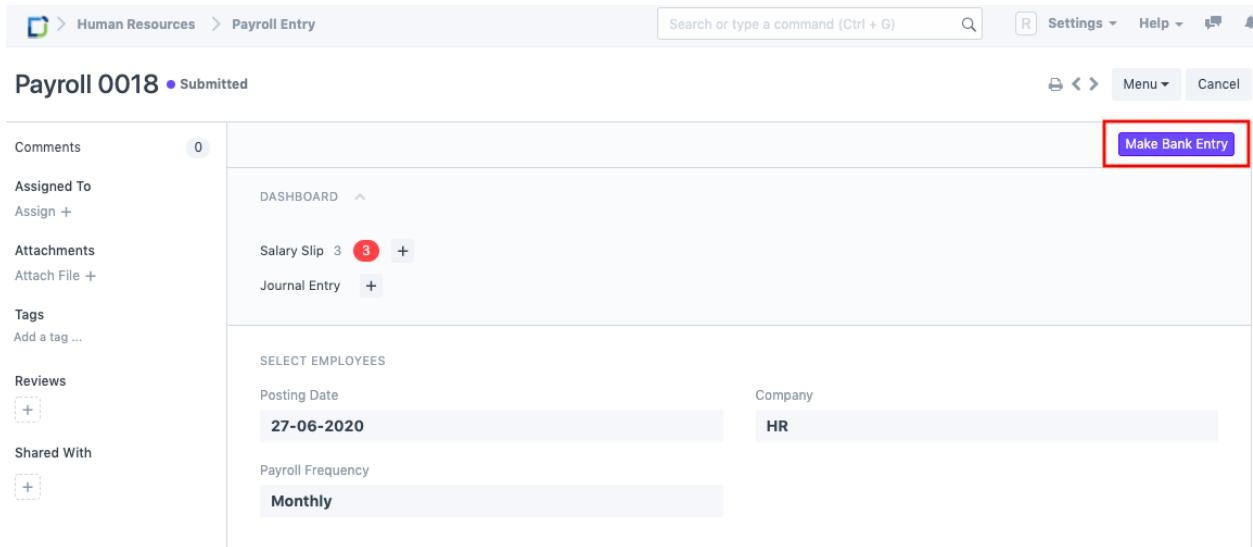
No Yes

This will submit Salary Slips and create accrual Journal Entry. Do you want to proceed?

Submit Salary Slip

## 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.



## 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	<input type="text" value="House Rent Allowance"/>	<input checked="" type="checkbox"/> 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.			
Abbr	HRA	<input checked="" type="checkbox"/> Is Tax Applicable <input type="checkbox"/> Is Flexible Benefit <input type="checkbox"/> Variable Based On Taxable Salary <input type="checkbox"/> Depends on Payment Days			
Condition	<div style="border: 1px solid red; padding: 2px; display: inline-block;">1 BS * .1</div>				
<b>Condition and Formula Help</b>					
Notes:					
1. Use field <b>base</b> for using base salary of the Employee 2. Use Salary Component abbreviations in conditions and formulas. <b>BS</b> = <b>Basic Salary</b> 3. Use field name for employee details in conditions and formulas. <b>Employment Type</b> = <b>employment_type</b> <b>Branch</b> = <b>branch</b> 4. Use field name from Salary Slip in conditions and formulas. <b>Payment Days</b> = <b>payment_days</b> <b>Leave without pay</b> = <b>leave_without_pay</b>					

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	Company
25-02-2020	HR
Payroll Frequency	
Monthly	
EMPLOYEES	
Branch	Designation
<input type="text"/>	<input type="text"/>
Department	
<input type="text"/>	
<input type="checkbox"/> 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
Print
Menu
Submit

**ASSIGNED TO**

Assign + EMP/00006

**ATTACHMENTS**

Attach File +

**TAGS**

Add a tag ...

**SHARED WITH**

+ Heena

HR

Employee Name Heena

Company Test

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
<a href="#">Add Row</a>				

**HRA EXEMPTION**

Monthly House Rent <span>₹ 15,000.00</span>	Annual HRA Exemption <span>₹ 1,20,000.00</span>
<input checked="" type="checkbox"/> Rented in Metro City	Monthly HRA Exemption <span>₹ 10,000.00</span>
HRA as per Salary Structure <span>₹ 10,000.00</span>	

Total Declared Amount <span>₹ 1,60,000.00</span>	Total Exemption Amount <span>₹ 2,80,000.00</span>
--	---

- 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						
	Component	Abbr	Statist...	Formula	Amount	
<input type="checkbox"/>	1 <b>Basic</b>	B	<input type="checkbox"/>		₹ 30,000.00	<input type="button" value="▼"/>
<input type="checkbox"/>	2 <b>House Rent Allowance</b>	HRA	<input type="checkbox"/>		₹ 15,000.00	<input type="button" value="▼"/>
<input type="checkbox"/>	3 <b>General Allowances</b>	GA	<input type="checkbox"/>		₹ 30,000.00	<input type="button" value="▼"/>

DEDUCTION						
	Component	Abbr	Statist...	Formula	Amount	
<input type="checkbox"/>	1 <b>Professional Tax</b>	PT	<input type="checkbox"/>		₹ 200.00	<input type="button" value="▼"/>
<input type="checkbox"/>	2 <b>Income Tax</b>	IT	<input type="checkbox"/>		₹ 0.00	<input type="button" value="▼"/>
<input type="checkbox"/>	3 <b>Education Cess</b>	EC	<input type="checkbox"/>	0.04*IT	₹ 0.00	<input type="button" value="▼"/>

- 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

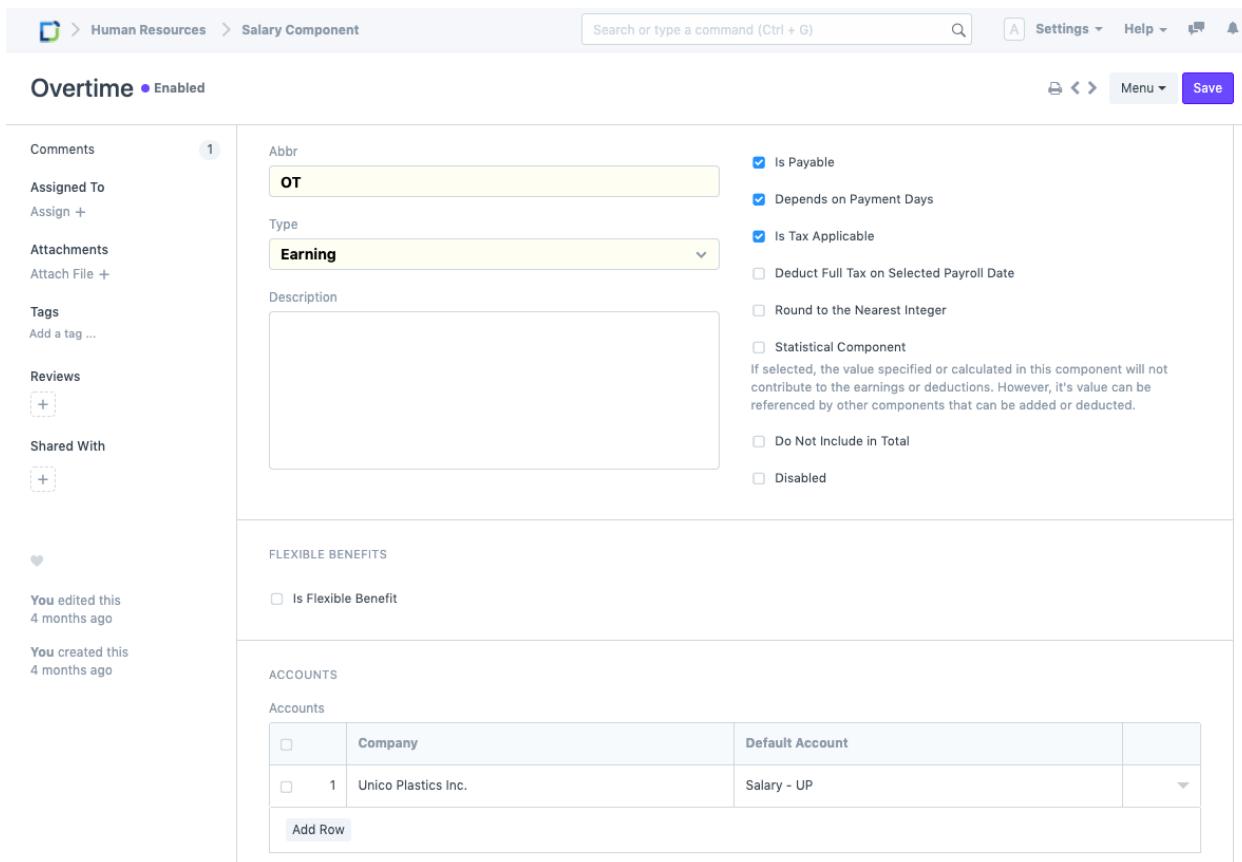
EARNING & DEDUCTION			
Earning		Deduction	
<input type="checkbox"/>	Component	Amount	
<input type="checkbox"/>	Basic	₹ 30,000.00	<input type="button" value="▼"/>
<input type="checkbox"/>	House Rent Allowance	₹ 15,000.00	<input type="button" value="▼"/>
<input type="checkbox"/>	General Allowances	₹ 30,000.00	<input type="button" value="▼"/>
<input type="button" value="Add Row"/>		<input type="button" value="Add Row"/>	
Gross Pay		Total Deduction	
₹ 75,000.00		₹ 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.



The screenshot shows a software interface for managing salary components. The top navigation bar includes 'Human Resources > Salary Component', a search bar, and various settings and help links. The main content area is titled 'Overtime • Enabled'. On the left, there are several sidebar sections: 'Comments' (1), 'Assigned To' (with an 'Assign +' button), 'Attachments' (with an 'Attach File +' button), 'Tags' (with an 'Add a tag ...' button), 'Reviews' (with an 'Add' button), and 'Shared With' (with an 'Add' button). The main form area has the following fields and settings:

- Abbr:** OT
- Type:** Earning
- Description:** (Empty text area)
- Options (checkboxes):**
  - 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, its value can be referenced by other components that can be added or deducted.
  - Do Not Include in Total
  - Disabled
- FLEXIBLE BENEFITS:** (checkbox: Is Flexible Benefit)
- ACCOUNTS:** (Table)
 

	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

Test 2019-20-1 • Submitted

Search or type a command (Ctrl + G)

Settings Help 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**

	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"/>	<b>5 Overtime</b>	OT			<b>₹ 0.00</b>	▼

5) Submit the Salary Structure and assign this Salary Structure to an Employee via Salary Structure Assignment.

Human Resources > Salary Structure Ass...

Jennifer Smith • Submitted

Search or type a command (Ctrl + G)

Settings Help Menu Cancel

HR-SSA-20-01-00004

Comments 0

Employee **HR-EMP-00026: Jennifer Smith**

Salary Structure **Test 2019-20-1**

Assigned To

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Reviews

Shared With

Employee Name **Jennifer Smith**

From Date **01-01-2020**

Department **Advertisement - UP**

Company **Unico Plastics Inc.**

Base **₹ 50,000.00**

Variable **₹ 0.00**

6) Create Timesheets for this Employee through the Timesheet DocType.

Projects > Timesheet

Search or type a command (Ctrl + G)

Settings Help Menu Cancel

### Jennifer's January Timesheet 1 • Payslip

TS-2020-00002

Comments	0	Title	Salary Slip																				
Assigned To		Jennifer's January Timesheet 1	Sal Slip/HR-EMP-00026/00001																				
Assign +		Company	Status																				
Attachments		Unico Plastics Inc.	Payslip																				
Attach File +																							
Tags		EMPLOYEE DETAIL																					
Add a tag ...		Employee	Start Date																				
Reviews		HR-EMP-00026: Jennifer Smith	18-01-2020																				
Shared With		Employee Name	Starting Time																				
		Jennifer Smith	12:38:58																				
		Department	End Date																				
		Advertisement - UP	18-01-2020																				
You edited this		Time Sheets																					
22 minutes ago		<table border="1"> <thead> <tr> <th></th> <th>Activity Type</th> <th>From Time</th> <th>Hrs</th> <th>Project</th> <th>Task</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Research</td> <td>18-01-2020 08:39:21</td> <td>2</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>2</td> <td>Proposal Writing</td> <td>18-01-2020 16:39:40</td> <td>4</td> <td></td> </tr> </tbody> </table>					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	
	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																			
You created this		Total Working Hours																					
29 minutes ago		6																					

Projects > Timesheet

Search or type a command (Ctrl + G)

Settings Help Menu Cancel

### Jennifer's January Timesheet 2 • Payslip

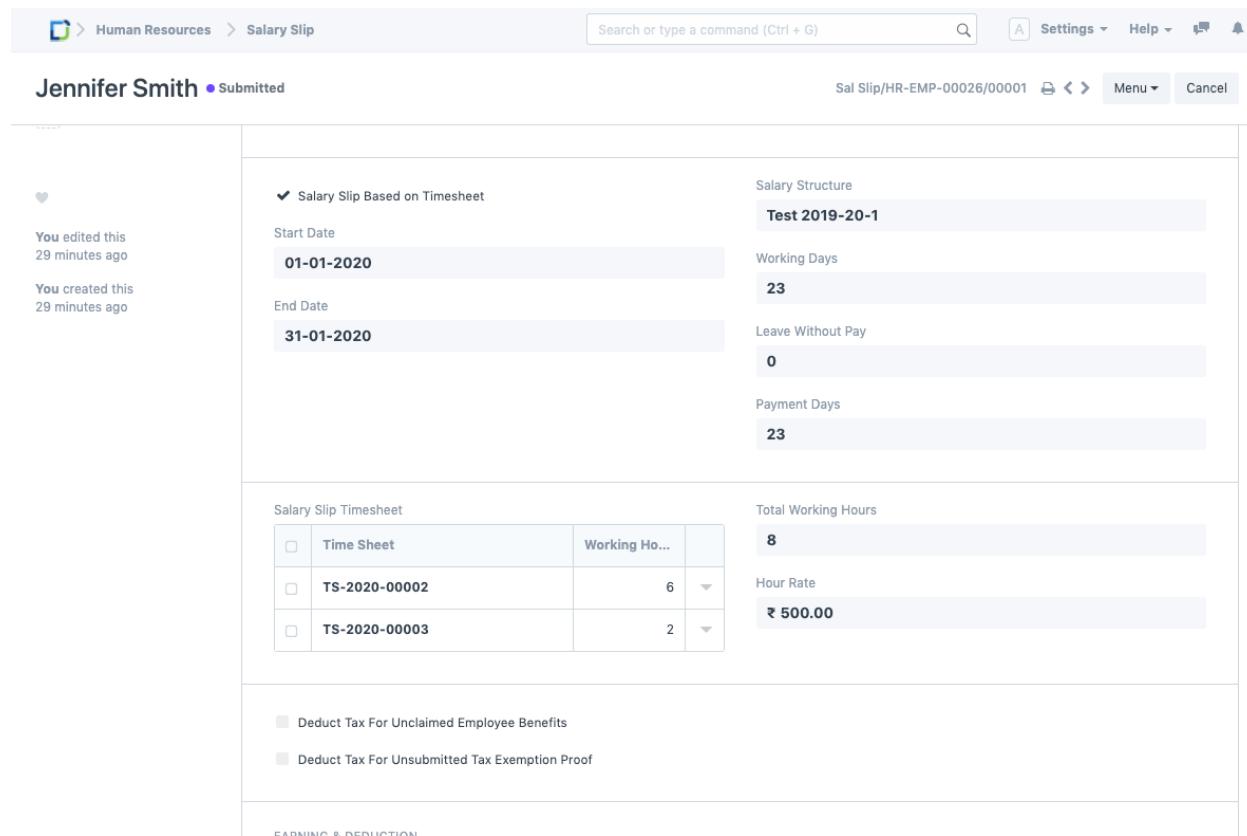
TS-2020-00003

Comments	0	Title	Salary Slip														
Assigned To		Jennifer's January Timesheet 2	Sal Slip/HR-EMP-00026/00001														
Assign +		Company	Status														
Attachments		Unico Plastics Inc.	Payslip														
Attach File +																	
Tags		EMPLOYEE DETAIL															
Add a tag ...		Employee	Start Date														
Reviews		HR-EMP-00026: Jennifer Smith	24-01-2020														
Shared With		Employee Name	Starting Time														
		Jennifer Smith	12:44:43														
		Department	End Date														
		Advertisement - UP	24-01-2020														
You edited this		Time Sheets															
22 minutes ago		<table border="1"> <thead> <tr> <th></th> <th>Activity Type</th> <th>From Time</th> <th>Hrs</th> <th>Project</th> <th>Task</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Client Query Handling</td> <td>24-01-2020 12:45:02</td> <td>2</td> <td></td> </tr> </tbody> </table>					Activity Type	From Time	Hrs	Project	Task	<input type="checkbox"/>	1	Client Query Handling	24-01-2020 12:45:02	2	
	Activity Type	From Time	Hrs	Project	Task												
<input type="checkbox"/>	1	Client Query Handling	24-01-2020 12:45:02	2													
You created this		Total Working Hours															
24 minutes ago		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.



The screenshot shows the 'Salary Slip' creation interface for Jennifer Smith. The top navigation bar includes 'Human Resources > Salary Slip', a search bar, and various settings and help buttons. The main form is titled 'Jennifer Smith' and shows the status 'Submitted'. The 'Salary Slip Based on Timesheet' checkbox is checked. The 'Start Date' is '01-01-2020' and the 'End Date' is '31-01-2020'. The 'Salary Structure' is set to 'Test 2019-20-1'. The 'Working Days' are '23', 'Leave Without Pay' is '0', and 'Payment Days' are '23'. The 'Salary Slip Timesheet' section shows two entries: 'TS-2020-00002' with 6 hours and 'TS-2020-00003' with 2 hours. The 'Total Working Hours' is '8' and the 'Hour Rate' is '₹ 500.00'. At the bottom, there are checkboxes for 'Deduct Tax For Unclaimed Employee Benefits' and 'Deduct Tax For Unsubmitted Tax Exemption Proof'. The footer contains a 'EARNING & DEDUCTION' link.

Jennifer Smith Submitted
Search or type a command (Ctrl + G) 
Settings 
Help 
Print 
Cancel

Sal Slip/HR-EMP-00026/00001
 
Menu

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"/>		
<input type="checkbox"/>	House Rent Allowance	₹ 3,000.00	<input type="checkbox"/>		
<input type="checkbox"/>	Dearness Allowance	₹ 3,000.00	<input type="checkbox"/>		
<input type="checkbox"/>	Medical	₹ 2,000.00	<input type="checkbox"/>		

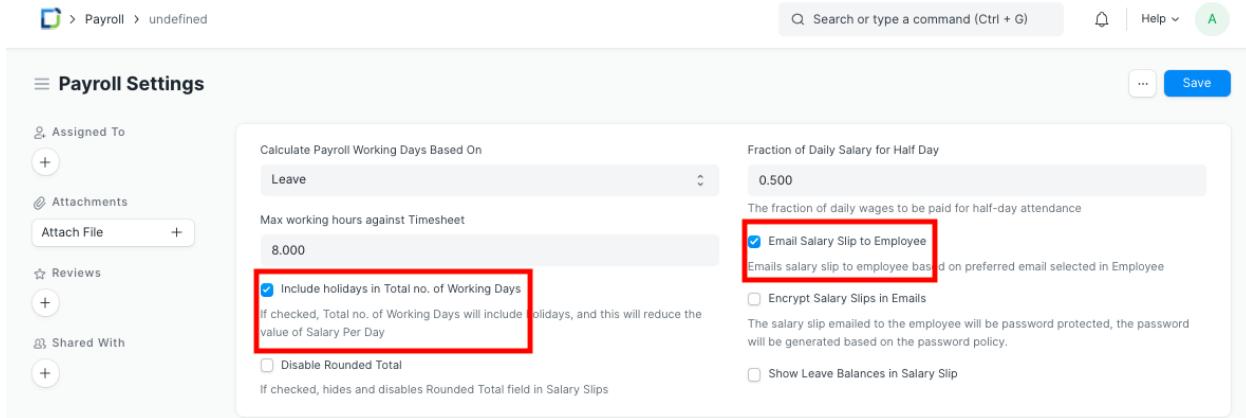
Gross Pay ₹ 22,000.00	Total Deduction ₹ 1,200.00
Total Principal Amount ₹ 0.00	Total Loan Repayment ₹ 0.00
Total Interest Amount ₹ 0.00	
NET PAY INFO	
Net Pay ₹ 20,800.00	Rounded Total ₹ 20,800.00
Gross Pay - Total Deduction - Loan Repayment	

## 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.



Payroll Settings

Assigned To

Attachments

Reviews

Shared With

Calculate Payroll Working Days Based On

Leave

Max working hours against Timesheet

8.000

**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

Fraction of Daily Salary for Half Day

0.500

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.

Show Leave Balances in Salary Slip

...

Save

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

Telephone Expenses • Enabled

Comments	0	Abbr	<input checked="" type="checkbox"/> Is Payable
Assigned To	T	Type	<input type="checkbox"/> Depends on Payment Days
Attachments	Earning		<input checked="" type="checkbox"/> Is Tax Applicable
Tags			<input type="checkbox"/> Deduct Full Tax on Selected Payroll Date
Reviews			<input type="checkbox"/> Round to the Nearest Integer
Shared With			<input type="checkbox"/> 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.
			<input type="checkbox"/> Do Not Include in Total
			<input type="checkbox"/> Disabled
FLEXIBLE BENEFITS			
<input checked="" type="checkbox"/> Is Flexible Benefit <input checked="" type="checkbox"/> Pay Against Benefit Claim		Max Benefit Amount (Yearly)	<input type="checkbox"/> Only Tax Impact (Cannot Claim But Part of Taxable Income)
		5,000.00	<input type="checkbox"/> Create Separate Payment Entry Against Benefit Claim

39.27MB (0%) used

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

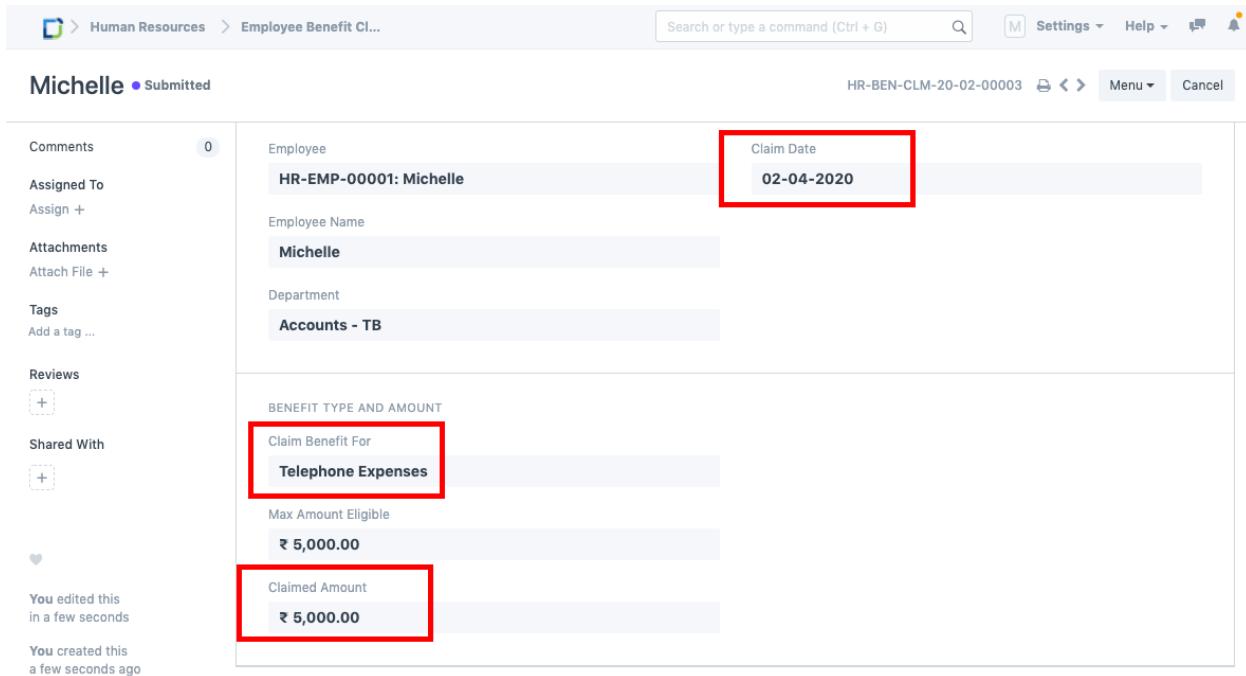
2019-20 • Submitted

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	
1 Basic	B			₹ 50,000.00	▼
2 House Rent Allowance	HRA			₹ 24,000.00	▼
3 Arrear	A			₹ 10,000.00	▼
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 Menu Cancel

Michelle • Submitted

HR-BEN-CLM-20-02-00003

Comments 0

Employee: HR-EMP-00001: Michelle

Claim Date: 02-04-2020

Assigned To: Assign +

Attachments: Attach File +

Tags: Add a tag ...

Reviews:

Shared With:

Heart icon

You edited this in a few seconds

You created this a few seconds ago

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

5) Run the Payroll Entry. The amount will be fetched against the component in the Salary Slip as seen below.

Human Resources > Salary Slip
Search or type a command (Ctrl + G)
Settings
Help
Menu
Submit

Michelle • Draft
Sal Slip/HR-EMP-00001/00002
30

Deduct Tax For Unclaimed Employee Benefits

Deduct Tax For Unsubmitted Tax Exemption Proof

30

EARNING & DEDUCTION

Earning

Earnings

	Component	Amount	
<input type="checkbox"/>	<b>Basic</b>	₹ 50,000.00	▼
<input type="checkbox"/>	<b>House Rent Allowance</b>	₹ 24,000.00	▼
<input type="checkbox"/>	<b>Arrear</b>	₹ 10,000.00	▼
<input type="checkbox"/>	<b>Telephone Expenses</b>	₹ 5,000.00	▼

[Add Row](#)

Deduction

Deductions

	Component	Amount	
No Data			

[Add Row](#)

Gross Pay

₹ 89,000.00

Total Deduction

₹ 0.00