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Introduction

This manual provides a comprehensive guide to managing payroll operations within the Zimyo HRMS platform. From configuration to processing, it is tailored for HR managers, finance professionals, and system administrators.

Zimyo's Payroll module is a powerful tool designed to streamline salary processing, benefits management, compliance, taxation, and employee financial records. With intuitive navigation, advanced automation, and insightful dashboards, Zimyo enables organizations to run payroll with accuracy, speed, and transparency.

Payroll Side Menu Overview

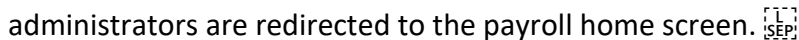
Zimyo's Payroll module consists of 10 core sections accessible from the left-side menu:

1. Home

Payroll Overview

The Home section provides a centralized payroll dashboard featuring key payroll KPIs and visual data summaries. It helps users track payroll requests, approvals, cost trends, budgeting, tax declarations, and more, all briefly.

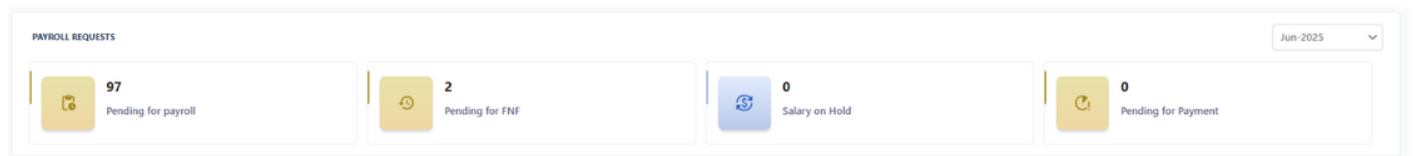
Payroll Navigation

To begin, log in to your Zimyo account and go to the "Payroll" app from the All Apps screen. Once selected, administrators are redirected to the payroll home screen. 

Login > All app Select Payroll > Payroll Home.

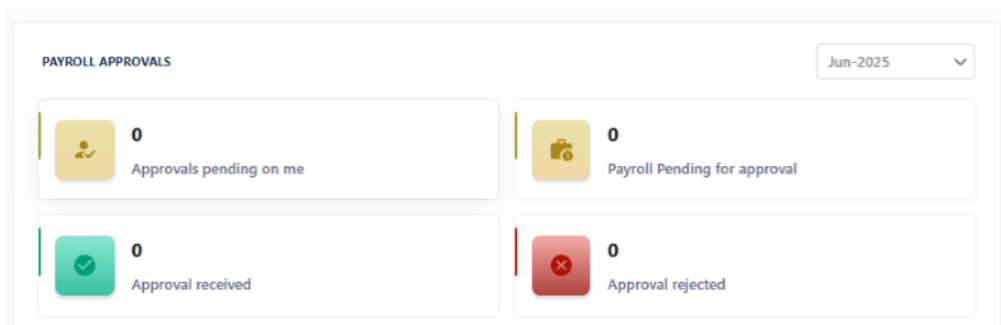
Dashboard Highlights:

- **Pending for Payroll:** Shows employees awaiting payroll processing. Clicking navigates to the processing list.
- **Pending for FNF:** Displays employees marked for final settlements.
- **Salary on Hold:** Highlights employees with suspended salaries.
- **Pending Payment:** Indicates employees who have not yet received payment.



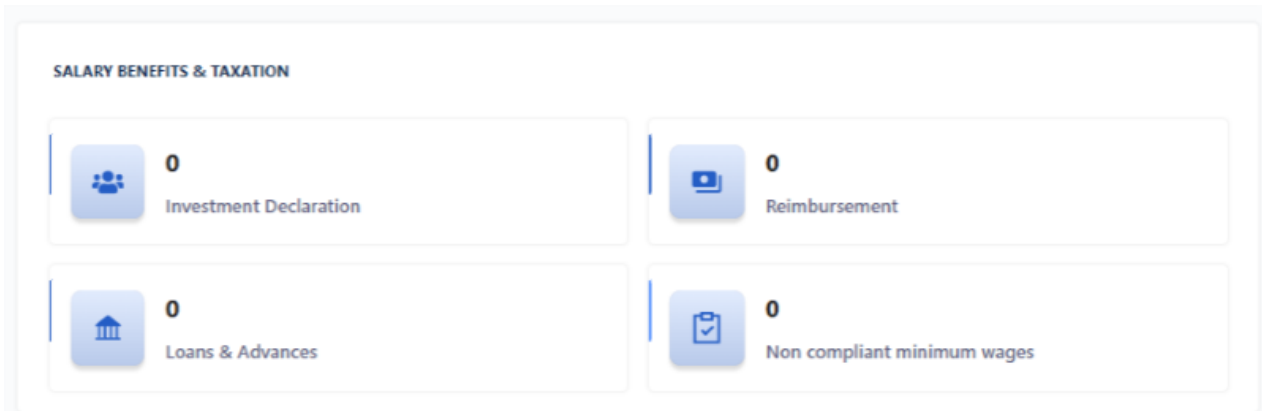
Payroll Approvals:

- **Approvals Pending on Me:** Requests that require the admin's to approval.
- **Payroll Pending for Approval:** Payroll sheets are awaiting final approval.
- **Approval Received and Rejected:** Summary of all approvals and rejections.



Salary, Benefits & Taxation Cards:

- **Investment Declarations:** Shows declarations submitted via ESS, pending admin action.
- **Reimbursement:** Tracks submitted proofs against CTC-linked reimbursements.
- **Loans & Advances:** Links to pending or processed employee loan/advance requests.



Budget Forecasting:

Provides monthly expense projections with filters for departments, entities, and locations.

Cost to Company (CTC) Analysis:

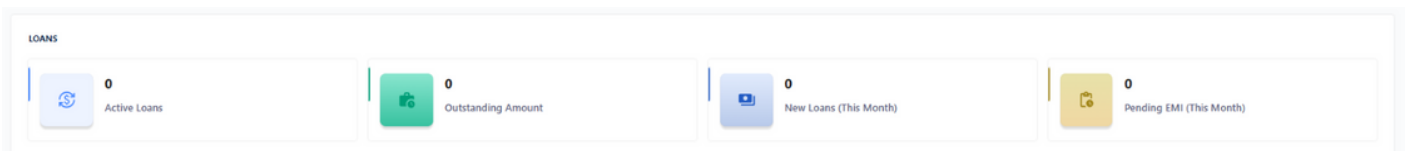
Visual chart that shows monthly trends in total company payroll costs over 3, 6, or 12 months.



Loan Overview:

Displays:

- Active loans
- Outstanding loan amount
- New loan count (monthly)
- Pending EMIs




2. Run Payroll

In the Zimyo Payroll system, administrators can execute payroll through these five sequential steps:

1. Manage Leave and Attendance
2. Process Arrears
3. Review and Run Payroll
4. Initiate Payouts
5. Publish Payslips

Payroll Navigation

To begin, log in to your Zimyo account and navigate to the payroll section from the All-Apps screen. Selecting the payroll option will redirect you to the payroll home screen.

Clicking “Run Payroll” on the left menu navigates the admin to the leave and attendance screen. 

Login > All apps Select payroll > Payroll > Run Payroll

Step 1. Leave and Attendance

- Select entity, month-year, status, and employee group status.
- Use dropdowns to apply filters (department, designation, zone, location, etc.).
- Click “Search” to load the employee list.

Success Tab

- Shows employees eligible for payroll processing.

Leave & Attendance | Process Arrear | Review & Run Payroll | Publish Payslips

Entity: All Entity, Ashok Auto-Sales Ltd + 19 more | Month-Year*: Nov-2025 | Status: Pending, Attendance Locked | Employee Group*: Active

More options ▾ Search 🔍

SUCCESS (2/184) ERROR (184)

Search Employee 🔍 Bulk Attendance Recompute ⬇️ Bulk Upload 📄

	EMPLOYEE NAME	ENTITY NAME	DESIGNATION	DEPARTMENT	LOCATION	WORKING DAYS	PAYABLE PRESENT	LOP DAYS	LEAVES	PENALIZED	OVERTIME	EXTRA OT	STATUS	ACTION
<input type="checkbox"/>	ot required 9431CDUJ 2311381511	test parent ctc	Executive	QA Engineer	kerala	20	0	30	0	0	N/A	N/A	Locked	⊖
<input type="checkbox"/>	Normal payroll MANUA ABBDGKGKGBS295...	test india	Analyst	HR	kerala	20	0	30	0	0	00:00	00:00	Pending	⊕
<input type="checkbox"/>	TEST EMP CODE TEST - TEST	Zimyo Test gross	Analyst	HR	kerala	20	0	30	0	0	00:00	00:00	Pending	⊖
<input type="checkbox"/>	test ot required OT REQUIRED	test parent ctc	Assistant Vice President	Admin	Maharashtra	20	0	30	0	0	N/A	N/A	Locked	⊖
<input type="checkbox"/>	1707410283411 hjyge... ERAS66QZ 221008344	test parent ctc	Executive	Admin	West Bengal	20	0	30	0	0	N/A	N/A	Locked	⊖
<input type="checkbox"/>	1707410339396 before... W48OOF2U 2210083944	test parent ctc	CEO	Product	Gurgaon HQ	20	0	30	0	0	N/A	N/A	Locked	⊖
<input type="checkbox"/>	1707410646306 wuctpf... 7Q64ORZZ 2210172644	test parent ctc	asistant manager	Management	Uttar Pradesh	20	0	30	0	0	00:00	00:00	Locked	⊖
<input type="checkbox"/>	1707410930645 trngzf... 913FDVWG 2210185044	test parent ctc	Analyst	tes	Delhi	20	0	30	0	0	N/A	N/A	Locked	⊖
<input type="checkbox"/>	170741037776 aoojmr... 85C8F3N4 2210203144	test parent ctc	CEO	Marketing	Pondicherry	20	0	30	0	0	00:00	00:00	Locked	⊖
<input type="checkbox"/>	170741090638 ftoocn... 112KXIO3Q 2210213044	test parent ctc	Senior Manager	Engineering	kerala	20	0	30	0	0	00:00	00:00	Locked	⊖
<input type="checkbox"/>	170741091964 yfbys... 7Y93OI14 2210213144	test parent ctc	asitant manager	Engineering	Maharashtra	20	0	30	0	0	00:00	00:00	Locked	⊖
<input type="checkbox"/>	170741067077 xateru...													⊖

Lock Attendance & Proceed

Error Tab

- Lists employees with missing data (e.g., DOB, DOJ, CTC) with a download option to rectify the errors.

Entity: All Entity, Ashok Auto Sales Ltd +19 more | Month-Year: Sep-2025 | Status: Pending, Attendance Locked | Employee Group: Active | More options | Search

SUCCESS (0/32) | **ERROR (183)** | **Download Error Logs**

#	EMPLOYEE NAME	REMARKS	ACTION
1	TEST TEST@TES-145N/5/5-145N/5/5...	Employee CTC not defined.	⚙️
2	test 1 TRETRE	Employee CTC not defined.	⚙️
3	test gross TEST UO	Invalid payroll type tagged (Hour Wise)	⚙️
4	Ramesh kumar ZIMY990	Employee CTC not defined.	⚙️
5	manoj kumar ZIMY990	Employee CTC not defined.	⚙️
6	Probation confirm MANUJA A8GBAFKAH805L...	Employee CTC not defined.	⚙️
7	Ravi probation test TEST000A	Employee CTC not defined.	⚙️
8	Manu A1BFCDF8CJ53493... NEWBULKTRANSFER A1BFC...	Employee CTC not defined.	⚙️
9	Manu A1BGAABJG52892... MANUJA A1BGAABJG52892...	Salary Structure is not frozen, please freeze before mapping to employee.	⚙️
10	Manu A1BGAACFA/94798... NEWBULKTRANSFER A1BGA...	Employee CTC not defined.	⚙️
11	Manu A1BGAABJG52892... MANUJA A1BGAABJG52892...	Salary Structure is not frozen, please freeze before mapping to employee.	⚙️
12	Manu A1BGAABJG52892... NEWBULKTRANSFER A1BGA...	Employee CTC not defined.	⚙️

Lock Attendance & Proceed

Action Button

- Map CTC:** Adjust salary components.
- Edit:** Modify LOP, OT, and leave encashment.
- Recompute:** Reflect bulk upload/changes.

SUCCESS (0/32) | ERROR (183) | **Download Error Logs**

#	EMPLOYEE NAME	REMARKS	ACTION
1	TEST TEST@TES-145N/5/5-145N/5/5...	Employee CTC not defined.	⚙️
2	test 1 TRETRE	Employee CTC not defined.	⚙️
3	test gross TEST UO	Invalid payroll type tagged (Hour Wise)	⚙️
4	Ramesh kumar ZIMY990	Employee CTC not defined.	⚙️

Map Salary

Modify Salary

Applicable from: [Calendar icon]

Structure: [Dropdown]

Pay Currency: United Arab Emirates Dirham (AED)

Employee CTC: 0

Overtime Plan: [Dropdown]

Bonus Plan: [Dropdown]

Show EPS Component: [Toggle]

Enforce ESI: [Toggle]

Remark: 0

Disable PF: [Toggle]

Disable LWF: [Toggle]

Disable ESIC: [Toggle]

Disable PT: [Toggle]

Employee ID: ZIMY990 | Employee Name: Ramesh Kumar | Designation: Analyst

Monthly CTC: ₹0 | Gross Salary: ₹0 | Yearly Fixed CTC: ₹0 | Deduction: ₹0 | Net Payable: ₹0 | TDS Rule: New Rule

Compute | Save

Menu Button

- Clicking the “**Back to menu**” button allows the admin to add additional fields to the employee list according to the organization’s needs. This menu encompasses various fields, including departments, lop days, employee names, codes, and more.



Indicators & Upload

- A red checkbox indicates an attendance change.
- Bulk recompute & upload (LOP, OT, leave encashment).

SUCCESS (2/55)

ERROR (13)

☒ Indicates Attendance Modification

Bulk Attendance Recompute

Bulk Upload

Recompute: Reflect bulk upload/changes.

Bulk Upload Loss of Pay

1. Download Sample
Use this template with pre-defined columns, and fill in your member data.

Download Sample

2. Import XLS/XLSX
Once you've filled out the XLS/XLSX, import it.

Drag & drop here or Choose file

Lock Attendance

Move to the next stage (process arrear).

Home

Run Payroll

Employees

Arrear

Full & Final

Benefits & Taxation

Imports

Reports

Payout

Configurations

Leave & Attendance

Process Arrear

Review & Run Payroll

Publish Payslips

Entity
All Entity, Ashok Auto Sales Ltd + 17 more

Month-Year
Nov-2025

Status

Employee Group
Active

More options

Search

SUCCESS (3/186)

ERROR (110)

Bulk Attendance Recompute

Bulk Upload

EMPLOYEE NAME	ENTITY NAME	DESIGNATION	DEPARTMENT	LOCATION	WORKING DAYS	PAYABLE PRESENT	LOP DAYS	LEAVES	PENALIZED	OVERTIME	EXTRA OT	STATUS	ACTION
<input checked="" type="checkbox"/> Test User 1	test parent ctc	Vice President	Finance	DUBAI	25	0	30	0	0	N/A	N/A	Pending	
<input checked="" type="checkbox"/> admin account 20005	Zimyo Test gross	asistant manager	Admin	Delhi	25	0	30	0	0	00:00	00:00	Pending	
<input checked="" type="checkbox"/> ot testing 4346UBAD 231134511	Zimyo Test gross	Manager	Engineering	Gujarat	20	0	30	0	0	00:00	00:00	Pending	
<input type="checkbox"/> test parent ctc 9431C0FY 2311385311	test parent ctc	Executive	QA Engineer	kerala	20	0	30	0	0	N/A	N/A	Pending	
<input type="checkbox"/> Normal payroll MANUA ABB0RG0RG0B0295...	test india	Analyst	Admin	kerala	20	0	30	0	0	00:00	00:00	Pending	
<input type="checkbox"/> TEST EMP CODE TEST-TEST	Zimyo Test gross	Analyst	Admin	kerala	20	0	30	0	0	00:00	00:00	Pending	
<input type="checkbox"/> test ot required OT REQUIRED	test parent ctc	Assistant Vice President	Admin	Maharashtra	20	0	30	0	0	N/A	N/A	Pending	
<input type="checkbox"/> 1707410283411 hjgle... 6WA-AS063 2210080344	test parent ctc	Executive	Admin	West Bengal	20	0	30	0	0	N/A	N/A	Pending	
<input type="checkbox"/> 1707410339396 beforeq... W480GF2U 2210080344	test parent ctc	CEO	Product	Gurgaon HQ	20	0	30	0	0	N/A	N/A	Pending	
<input type="checkbox"/> 1707410846306 wucpfl... 7Q6ACRZZ 2210172644	test parent ctc	asistant manager	Management	Uttar Pradesh	20	0	30	0	0	00:00	00:00	Pending	
<input type="checkbox"/> 1707410930645 trngzf... 013FQV6G 22101805044	test parent ctc	Analyst	tes	Delhi	20	0	30	0	0	N/A	N/A	Pending	
<input type="checkbox"/> 170741037776 aogjmr... 65CMF3NA 2210203744	test parent ctc	CEO	Marketing	Pondicherry	20	0	30	0	0	00:00	00:00	Pending	
<input type="checkbox"/> 170741090658 fhouer...													

Lock Attendance & Proceed

Step 2. Process Arrear

- Select employees, then click “Next.”
- Skip if arrears are not applicable.
- Bulk upload arrears using predefined templates.
- View monthly breakdowns.

Leave & Attendance | **Process Arrear** | Review & Run Payroll | Publish Payslips

Hold Status: Active | Entity: Ashok Auto Sales Ltd + 17 | Month Year: Nov-2025

Search Employee | Compute Arrear Days | Upload Arrear

<input checked="" type="checkbox"/>	EMPLOYEE NAME	DEPARTMENT	ARREAR DEDUCTION	ARREAR GROSS	ARREAR MONTH	ARREAR DAYS	ARREAR PAYABLE
<input checked="" type="checkbox"/>	Test User 1	Finance	₹ 39374	₹ -17588	1 Month	0	₹ -56962

Skip | Previous | **Next**

Bulk upload arrears using predefined templates.

Bulk Upload Loss of Pay

1. Download Sample
Use this template with pre-defined columns, and fill in your member data.

Download Sample

2. Import XLS/XLSX
Once you've filled out the XLS/XLSX, import it.

Drag & drop here or Choose file

Review and Run Payroll

- Perform final checks before processing.
- Action options: View Salary, Edit Deductions, Recompute, etc.

Leave & Attendance

Process Arrear

Review & Run Payroll

Publish Payslips

Hold Status : Active

Pay Status : Pending=1

Entity : Autoh Auto Sales Ltd - 19

Month Year : Sep-2025

SUCCESS (32)

ERROR (0)

Search Employee

Recompute Payroll

Draft Salary Report

Bulk Upload

EMPLOYEE NAME	DEPARTMENT	PAID DAYS	GROSS PAY	DEDUCTIONS	TAXES	VARIABLE PAY	ARREAR	NET PAY	ACTION
<input type="checkbox"/> admin account Z0025	HR	0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	
<input type="checkbox"/> ot testing 43HGB4D Z31134511	HR	0	₹ 20700	₹ 10	₹ 0	₹ 0	₹ 0	₹ 20690	
<input type="checkbox"/> Normal payroll MANUA ABB09GDKGB5295...	HR	0	₹ -9640	₹ 267	₹ 0	₹ 0	₹ -9907	₹ -9907	
<input type="checkbox"/> TEST EMP CODE TEST-TEST-	HR	0	₹ 100	₹ 0	₹ 0	₹ 0	₹ 0	₹ 100	
<input type="checkbox"/> Separated hold HQOT3SEQ 221022844	HR	0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	
<input type="checkbox"/> test pro PRO-215	HR	0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	
<input type="checkbox"/> Test Candidate TESTONB	HR	0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	
<input type="checkbox"/> Manu AGCCAAFFI82893... MANUA AGCBODGICJ2263...	HR	0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	
<input type="checkbox"/> Manu AGCCAA88BH429873... MANUA AGCCAA88BH11956...	HR	0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	
<input type="checkbox"/> Test Prob Mail MANUA AGCHMAAJDA4424...	HR	0	₹ 1333	₹ 0	₹ 0	₹ 0	₹ 0	₹ 1333	
<input type="checkbox"/> Manu AHAB8FFKFL72958... MANUA AHAB8FFKFL3128...	HR	0	₹ 1333	₹ 0	₹ 0	₹ 0	₹ 0	₹ 1333	
<input type="checkbox"/> test full name TEST EMP CODE	HR	0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	
<input type="checkbox"/> test full name TEST REIMS	HR	0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	₹ 0	
<input type="checkbox"/> tax declaration									

Previous

Next

View

Edit

Recompute

Revise salary

- Perform final checks before processing.

×

Emp Code :Z0025

₹ 0.00

Earnings

₹ 0.00

BASIC

₹ 0.00

HRA

₹ 0.00

New_Head

₹ 0.00

Laptop Allowance

₹ 0.00

Special Allowance....

₹ 0.00

Travell Allowance

₹ 0.00

Car Maintenance

₹ 0.00

Car Fuel

₹ 0.00

Driver Salary

₹ 0.00

LTA

₹ 0.00

CCA

₹ 0.00

Covenyance

₹ 0.00

Medical

₹ 0.00

Uniform allowance

₹ 0.00

Food Allowance

₹ 0.00

Conveyance Allowance

₹ 0.00

Indicative Group Medical Insurance Premium

₹ 0.00

Miscellaneous Earning

₹ 0.00

Deductions

Amount

Income Tax

0

Employee ESI

₹ 0.00

Cancel

Save

Success Tab

- Employees are ready for the payroll run.

Bulk Upload Options

- Override TDS
- Miscellaneous Entries
- Bonus Upload

Draft Salary Report

- Download salary reports in bulk.

Recompute Payroll

- Bulk recalculates selected employees.

Error Tab

- Lists employees with issues; shows error remarks.

The screenshot shows the 'Review & Run Payroll' section of the software. At the top, there are tabs for 'Leave & Attendance', 'Process Arrear', 'Review & Run Payroll' (which is active and highlighted with a red box), and 'Publish Payslips'. Below these are filters for 'Hold Status: Active', 'Pay Status: Pending+1', 'Entity: Ashok Auto Sales Ltd+19', and 'Month Year: Sep-2025'. A summary bar shows 'SUCCESS (32)' and 'ERROR (0)'. A search bar and buttons for 'Recompute Payroll', 'Draft Salary Report', and 'Bulk Upload' (highlighted with a red box and an arrow) are present. Below is a table of employees with columns: EMPLOYEE NAME, DEPARTMENT, PAID DAYS, GROSS PAY, DEDUCTIONS, TAXES, VARIABLE PAY, ARREAR, and NET PAY. The table lists four employees: 'admin account', 'ot testing', 'Normal payroll', and 'TEST EMP CODE'. To the right of the 'Bulk Upload' button, a dropdown menu is open, showing options: 'Miscellaneous Earning/Deduction', 'Bonus', and 'Override Income Tax' (all highlighted with a red box). Below the table is a 'Bulk Upload Loss of Pay' section with instructions and buttons for 'Download Sample' and 'Import XLS/XLSX'.

EMPLOYEE NAME	DEPARTMENT	PAID DAYS	GROSS PAY	DEDUCTIONS	TAXES	VARIABLE PAY	ARREAR	NET PAY
admin account	HR	0	₹0	₹0	₹0	₹0	₹0	₹0
ot testing	HR	0	₹20700	₹10	₹0	₹0	₹0	₹20690
Normal payroll	HR	0	₹-9640	₹267	₹0	₹0	₹-9907	₹-9907
TEST EMP CODE	HR	0	₹100	₹0	₹0	₹0	₹0	₹100

Payroll Approval

- Configure approval levels (Level 1, 2).
- Sub-admins request payroll approval.
- Approvers receive notifications and approve/reject.
- Approved: proceed to payout/payslip.

The screenshot shows the 'Review & Run Payroll' section of the software. At the top, there are tabs for 'Leave & Attendance', 'Process Arrear', 'Review & Run Payroll' (which is active and highlighted with a red box), and 'Publish Payslips'. Below these are filters for 'Hold Status: Active', 'Entity: Ashok Auto Sales Ltd+17', and 'Month Year: Nov-2025'. A summary bar shows 'SUCCESS (3)' and 'ERROR (0)'. A search bar and buttons for 'Recompute Payroll' (highlighted with a red box and an arrow), 'Draft Salary Report', 'Bulk Upload', and a home icon are present. Below is a table of employees with columns: EMPLOYEE NAME, DEPARTMENT, PAID DAYS, GROSS PAY, DEDUCTIONS, TAXES, VARIABLE PAY, ARREAR, NET PAY, and ACTION. The table lists three employees: 'Test User', 'admin account', and 'ot testing'. The 'Test User' row has a checkbox selected (highlighted with a red box and an arrow). At the bottom right, there are 'Previous' and 'Next' buttons, with the 'Next' button highlighted with a red box and an arrow.

EMPLOYEE NAME	DEPARTMENT	PAID DAYS	GROSS PAY	DEDUCTIONS	TAXES	VARIABLE PAY	ARREAR	NET PAY	ACTION
Test User	Finance	0	₹-12588	₹51368.89	₹0	₹5000	₹-56962	₹-63956.89	
admin account	Admin	0	₹0	₹0	₹0	₹0	₹0	₹0	
ot testing	Engineering	0	₹20700	₹10	₹0	₹0	₹0	₹20690	

Publish Salary Slip

- Finalize payroll by publishing payslips.
- **Print:** Generate payslip PDF.
- **Mark as Paid:** Set payroll status to “Paid.”
- **Download Bank Sheet:** Excel export for bank upload.

The screenshot shows the 'Payroll Successfully' screen. At the top, a progress bar indicates the current step is 'Publish Payslips'. The main heading is 'Payroll Successfully' with a sub-message: 'You have successfully processed the payroll for 2 employees (Sep 2025)'. Below this, three buttons are visible: 'Generate Payslips', 'Mark as Paid', and 'Go to payroll'. The 'Publish Payslips' button is highlighted with a red box. On the left, a 'Payroll Summary' table lists various amounts. In the center, a 'Payroll Status' section shows a progress bar for '2 out of 396 Payroll Processed' at 0.51%. On the right, a 'Select Reference Month for TDS Filing' dropdown is present, and a group of three buttons ('Bank Sheet', 'Freeze Entity', 'Freeze Employee') is highlighted with a red box.

Payroll Summary	
CTC Amount:	₹ 148333
Gross Amount:	₹ 20700
Payable Amount:	₹ 20690
Total EPF Wages:	₹ 0
Total PF Contributions:	₹ 0
Total ESI Contribution:	₹ 0

Payroll Status	
2 out of 396 Payroll Processed	0.51%

Select Reference Month for TDS Filing		
Bank Sheet	Freeze Entity	Freeze Employee
Download	Freeze	Freeze

- **Freeze Entity:** Exclude employees from payroll. By clicking the button, the admin can freeze the payroll process for the entire entity. After freezing, the admin loses visibility of that specific entity throughout the entire payroll running process for that month, hindering further processing.
- **Freeze Employee:** As an entity, the admin has the option to exempt specific employees, ensuring their non-participation in the payroll process for a particular month.

This screenshot is similar to the previous one, showing the 'Payroll Successfully' screen. However, the 'Publish Payslips' button in the top navigation bar is highlighted with a red box. Additionally, the 'Freeze Entity' and 'Freeze Employee' buttons in the bottom right section are highlighted with a red box. The 'Run Payroll' button in the left sidebar is also highlighted with a red box. The rest of the screen content, including the 'Payroll Summary' table, 'Payroll Status' progress bar, and 'Bank Sheet' button, remains the same.

Payroll Summary	
CTC Amount:	₹ 148333
Gross Amount:	₹ 20700
Payable Amount:	₹ 20690
Total EPF Wages:	₹ 0
Total PF Contributions:	₹ 0
Total ESI Contribution:	₹ 0

Payroll Status	
2 out of 396 Payroll Processed	0.51%

Select Reference Month for TDS Filing		
Bank Sheet	Freeze Entity	Freeze Employee
Download	Freeze	Freeze

3. Employees

Overview

In the employee section, the admin gains a comprehensive overview of all individuals working within the organization. This includes details such as salary status, employee code, designation, and department affiliation for each employee. The Portal provides different filter applications to make the search easy for an admin.

Description: View and manage all payroll-relevant employee details.

Features: Update CTC, salary structure, LOP, and payment mode.

1. Employees
2. Payslips
3. Actions Logs
4. Tip Calculator
5. Email Document

The screenshot displays the 'Employees' management page. At the top, there's a search bar and navigation tabs for Employees, Payslips, Action Logs, Tip Calculator, and Email Documents. Below the tabs, a filter section allows searching by Entity, Department, Designation, Location, Employee Status, and Employee Branch. A dropdown menu is open for the 'Employees' section, showing options like Payslips, Action Logs, Tip Calculator, and Email Documents. The main area shows a grid of employee cards, each with a profile picture, name, designation, department, and employee code. The employees listed are Max (Vice President), admin account (assistant manager), ot testing (Manager), ot required (Executive), Normal payroll (Analyst), TEST EMP CODE (Analyst), TEST (assistant manager), test ot required (Assistant Vice Presi...), 1707410283411 hjgte... (Executive), 1707410339396 befcrc... (CEO), and several others with codes like TEST-TEST-, TEST@TES-!#5%&..., OT REQUIRED, 6WA466K3 221008..., and W48OGF2U 221008....

Upload Form 16A

Clicking on this button allows the admin to upload Form 16A. Form 16A will be downloaded from the TRACES website by employers, fill in all the necessary details and upload the Zip folder. Upon the successful upload of Form 16A by the administrator on this page, employees will gain access to download it conveniently through their Employee Self-Service (ESS) portal.

Note: Form 16A is a certificate issued under the Income Tax Act, providing details of the TDS (Tax Deducted at Source) deducted on income other than salaries. It includes the deductor and deductee details, TDS deducted, and income type.

How to Upload Form 16A

- Create a Zip Folder with all the documents to upload.
- The document should be named as DocumentName_UniqueIdentifier (e.g., Form16_AJCPY3432K).

Employees(395)

Search Employees

Upload Form 16

Entity: All Entities, Department: All Department, Designation: All Designation, Location: All Location, Employee Status: Active Employee, Employee Branch: [Dropdown]

Search Employee Codes (Separated ...)

Submit

Employee Name	Designation	Department	Employee Code
Max	Vice President	HR	1
admin account	assistant manager	HR	Z0025
ot testing	Manager	HR	434IG84D 231134...
ot required	Executive	HR	9431COVU 231138...
Normal payroll	Analyst	HR	MANUA AB8DBGDKG...
TEST EMP CODE	Analyst	HR	TEST-TEST-
TEST	assistant manager	HR	TEST@TES-!P\$!%&...
test ot required	Assistant Vice Presi...	HR	OT REQUIRED
1707410283411 hjigte...	Executive	HR	6WA466K3 221008...
1707410339396 befcrq...	CEO	HR	W480GF2U 221008...

Form 16

Entity: [Dropdown], Department: [Dropdown], Designation: [Dropdown], Location: [Dropdown], Employee Status: [Dropdown], Fin Year: 2025, Form Generation Status: [Dropdown], Quarter (For Consultants Form): [Dropdown]

SUCCESS (0/108) ERROR (0)

Search Employees

Merge form-16, Upload PFY Certificate, Delete in Bulk, Upload Form-16, Export table data

EMPLOYEE NAME	DESIGNATION	DEPARTMENT	ENTITY	STATUS
Monika Sharma	CEO	Admin	Sales XIII	No Form Uploaded
Sandhya Kumar	Assistant Vice President	Admin	Sales XIII	No Form Uploaded
Tanya Upreti	Analyst	Finance	Sales XIII	No Form Uploaded
Nitish Kumar	Manager	HR	Sales XIII	No Form Uploaded
Sumit Kaushik	Senior Executive	Management	Sales XIII	No Form Uploaded
Ashwani	Senior Manager	Finance	Sales XIII	No Form Uploaded
Vikram Bisht	Senior Executive	Sales	Sales XIII	No Form Uploaded
Dreepanshu	Manager	Finance	Sales XIII	No Form Uploaded
Arpit	Senior Executive	Marketing	Sales XIII	No Form Uploaded
Ayush Sharma	Senior Executive	Management	Sales XIII	No Form Uploaded
Ajay	Assistant Vice President	Management	Sales XIII	No Form Uploaded
Chhavi	Analyst	Admin	Sales XIII	No Form Uploaded
Shafali	Executive	HR	Sales XIII	No Form Uploaded
Aarthi	Manager	Sales	Sales XIII	No Form Uploaded
Sandip Vedpathak

Financial Year: 2025-2026, Unique Identifier: [Dropdown]

Form Part: [Dropdown]

Drag & drop here or Choose file

Note: 1. Create a Zip Folder with all the documents (only pdf files) you want to bulk upload.
2. The document shall be named as <Employee's Unique Identifier> .<File_Name> pdf i.e. For example, the unique identifier is PAN number and uploading Form 16 for an employee, hence, the documents shall be named as: AJCPY3432K_Form16

Cancel, Submit

Select Employee

Note: Admin can toggle between card and grid views via the top-right corner icon.

Clicking on a specific employee opens an advanced view with these sections:

- Summary
- Salary Details
- Salary Slips
- Loans
- Advances
- Expenses
- Previous Employee Earnings
- Investment Declarations
- Vehicle Perquisites

The screenshot shows the 'Employees' page with 108 employees listed. The 'Employees' tab is selected in the top navigation bar. The left sidebar has the 'Employees' icon highlighted. The grid displays employee cards for Monica Sharma (CEO), Sandhya Kumar (Assistant Vice Pres.), Tanya Upreti (Analyst), Nitish Kumar (Manager), Sumit Kaushik (Senior Executive), Ashwani (Senior Manager), Vikram Bisht (Senior Executive), Deepanshu (Manager), Arpit (Senior Executive), and Ayush Sharma (Senior Executive). Each card shows the employee's name, photo, department, and employee code.

The screenshot shows the advanced view for Monica Sharma. The page has a top navigation bar with tabs: SUMMARY, SALARY DETAILS, SALARY SLIPS, LOANS, ADVANCE, EXPENSE, PREVIOUS EMPLOYEE EARNINGS, INSURANCE, INVESTMENT DECLARATIONS, REIMBURSEMENT, and VEHICLE PERQUISITE. The 'SUMMARY' tab is selected. Below the tabs, there are sections for Salary Account Details, Actions, and Downloads. The 'Salary Account Details' section shows account holder name, bank IFSC code, account number, and name of bank. The 'Actions' section includes buttons for Modify Salary, Hold Salary, Hold Salary History, and TDS Projection Report. The 'Downloads' section lists various forms and reports available for download.

Summary

A timeline showing all payroll modifications for the employee.

Actions:

- **Modify Salary:** Allows salary structure edits.
- **Salary on Hold:** Puts salary on hold for selected months and reasons.
- **Hold Salary History:** View and edit hold status.
- **TDS Projection Report:** Compares tax deductions under old/new regimes.

Monika Sharma

SUMMARYSALARY DETAILS
SALARY SLIPS
LOANS
ADVANCE
EXPENSE
PREVIOUS EMPLOYEE EARNINGS
INSURANCE
INVESTMENT DECLARATIONS
REIMBURSEMENT
VEHICLE PERQUISITE

Salary Account Details

Account Holder Name

Bank IFSC Code

Account Number

Name of Bank

Actions

Modify Salary

Hold Salary

Hold Salary History

TDS Projection Report

Downloads

Form 11

Form 16 Part-A

Form 16 Part-B

Form 12

Leave Wages Form

National festive Form

Salary Report

Annual Sheet

Taxsheet

CTC Lifetime Report

Form 3A

Form 19

Form F

Form 12BA

Modify Salary: Allows salary structure edits.

Modify Salary

Modify Salary

Applicable from
01-May-2024

Structure
Scogo Network 4.5 copy Copy(CTC)

Pay Currency
Indian Rupee (₹)

Employee CTC
500000

Overtime Plan

Bonus Plan
Variable Pay

Show EPS Component

Enforce ESI

Remark

Employee ID
1

Employee Name
Monika Sharma

Designation
CEO

Monthly CTC: ₹ 41667

Gross Salary: ₹ 38565

Yearly Fixed CTC: ₹ 500000

Deduction: ₹ 2500

Net Payable: ₹ 36065

TDS Rule: New Rule

Bonus(Variable/Fixed)

HEAD

Variable Pay (Monthly)

CALCULATION

Variable (Flat)

HEAD AMOUNT

0

EARNING

HEAD

Basic

CTC * 40/100

16667

HRA

(BASIC * 50/100)

8334

Special Allowances

SYSTEM

9397

Performance Bonus

(BASIC * 25/100)

4167

DEDUCTION

HEAD

PF

SYSTEM

1800

PT

SYSTEM

200

Medical (Employee)

FLAT

500

COMPLIANCES

HEAD

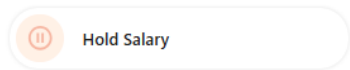
CALCULATION

HEAD AMOUNT

Compute

Save

Salary on Hold: Puts salary on hold for selected months and reasons.



Hold Salary

Note: Leave End Month blank to hold permanently.

Start Month *

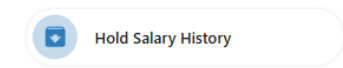
End Month

Reason for hold *

Cancel

Hold

Hold Salary History: View and edit hold status.



Hold Salary History

Last Payroll Run : Nov-2024

START HOLD MONTH	END HOLD MONTH	HOLD ON	HOLD BY	HOLD REASON	UNDO ON	UNDO BY	ACTION
-	-	Nov 8, 2023	Monika Sharma	na	-	-	

Hold Salary

Note: Leave End Month blank to hold permanently.

UNDO

UN HOLD

Salary Hold Range:

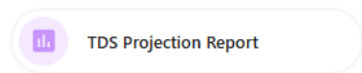
onwards

Remarks *

Cancel

Undo





























TDS Projection Report: Compares tax deductions under old/new regimes.



Old TDS				New TDS (ACTIVE)	
HEAD NAME	SECTION	DECLARED AMOUNT	ACCEPTED AMOUNT	 No Record Found	
PF	80C	21600	18000		
Professional tax	PT	2400	2000		
Standard Deduction		50000		Standard Deduction	
				75000	
Total Deduction		20000		Total Deduction	
				0	
Taxable Income		315650		Taxable Income	
				310650	
Tax Slab		250000-500000		Tax Slab	
				0-400000	
Annual TAX + CESS		0		Annual TAX + CESS	
				0	
TDS Monthly		0		TDS Monthly	
				0	

Downloads

Access and save reports: Salary Report, Annual Sheet, Tax Sheet, etc.

Downloads			
 Form 11		 Form 16 Part-A	
 Leave Wages Form		 National festive Form	
 Taxsheet		 CTC Lifetime Report	
 Form F		 Form 12BA	
		 Form 16 Part-B	
		 Salary Report	
		 Form 3A	
		 Form 12	
		 Annual Sheet	
		 Form 19	

Salary Timeline

Access and view the salary timeline.

Timeline

The timeline displays four sequential salary updates:

- Salary Added** (Green label) | **Current Structure: Scogo Network 4.5 copy Copy**
Current Salary: 500000
Updated on 11 Jun'24
Remark:
- Salary Added** (Green label) | **Current Structure: AVP/VP/ Assistant Manager**
Current Salary: 1500000
Updated on 01 Nov'23
Remark:
- Salary Added** (Green label) | **Current Structure: AVP/VP/ Assistant Manager**
Current Salary: 1500000
Updated on 01 Nov'23
Remark:
- Salary Added** (Green label) | **Current Structure: AVP/VP/ Assistant Manager**
Current Salary: 600000
Updated on 17 Sep'23
Remark:

Salary Details

Breakdown of earnings, deductions, and compliance.

Home

Run Payroll

Employees

Assets

Full & Final

Benefits & Taxation

Imports

Reports

Payout

Configurations

Employees

Paylips

Action Logs

Tip Calculator

Email Documents

Monika Sharma

SUMMARY

SALARY DETAILS

SALARY SLIPS

LOANS

ADVANCE

EXPENSE

PREVIOUS EMPLOYEE EARNINGS

INSURANCE

INVESTMENT DECLARATIONS

REIMBURSEMENT

VEHICLE PERQUISITE

Monika Sharma (1)

CEO

Monthly CTC: ₹ 41667

Monthly Gross Salary: ₹ 38565

Monthly Deductions: ₹ 2500

Monthly Net Payable: ₹ 36065

Applicable From

Employee CTC

Structure

Incentive Plan

Overtime Plan

Bonus Plan

Enforce ESIC

Enforce Till Month

2024-05-01

500000

Scogo Network 4.5 Copy Copy(CTC)

None

None

Variable Pay

No

2024-04-01

BONUS

Variable Pay(Monthly)

0

Earnings

Basic

HRA

Special Allowances

Performance Bonus

16667

8334

9397

4167

Deductions

PF

PT

Medical (Employee)

1800

200

500

Compliances

EPF

Gratuity

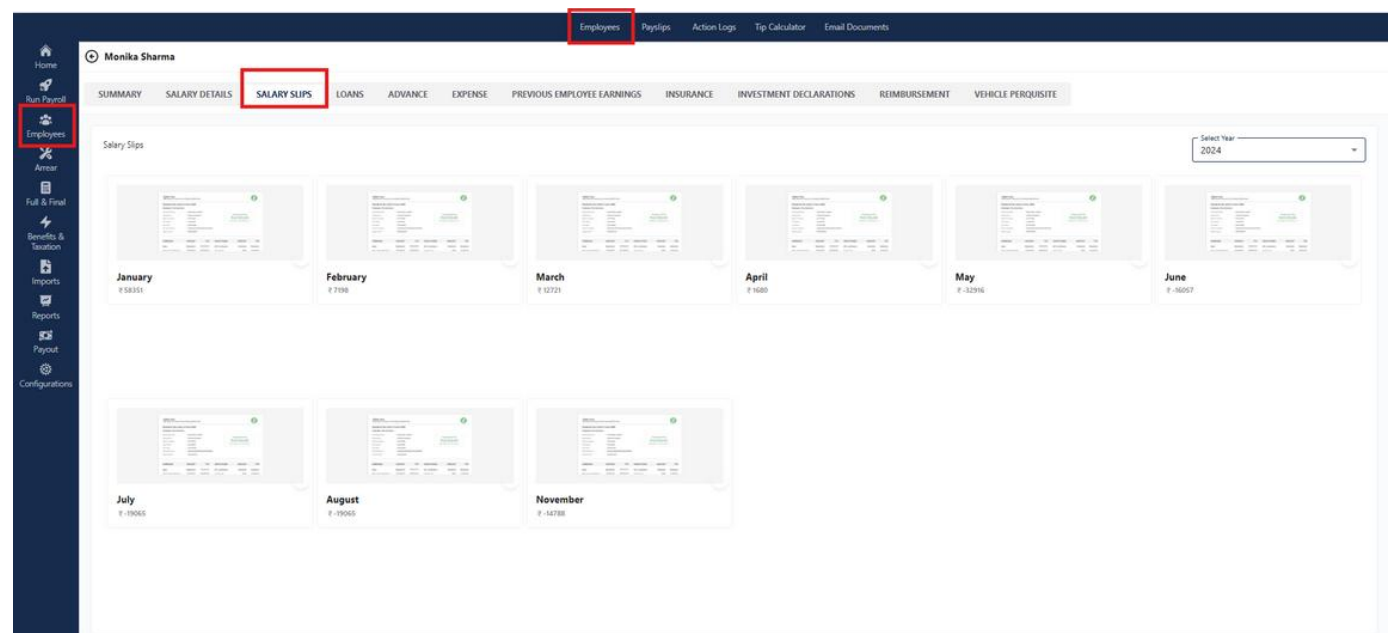
Medical Employer 2

1800

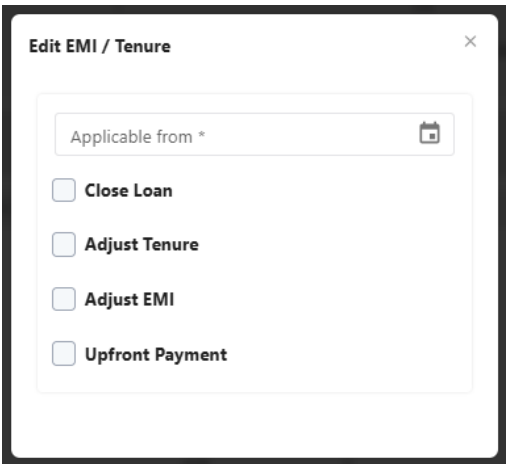
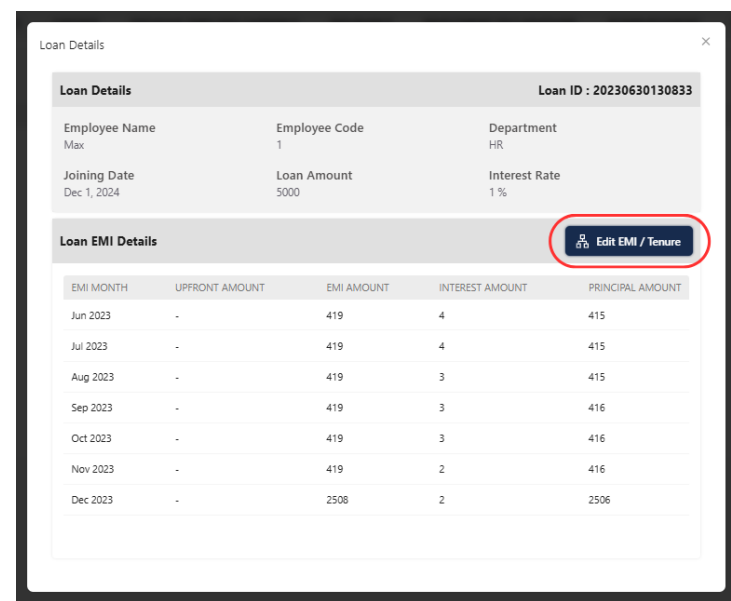
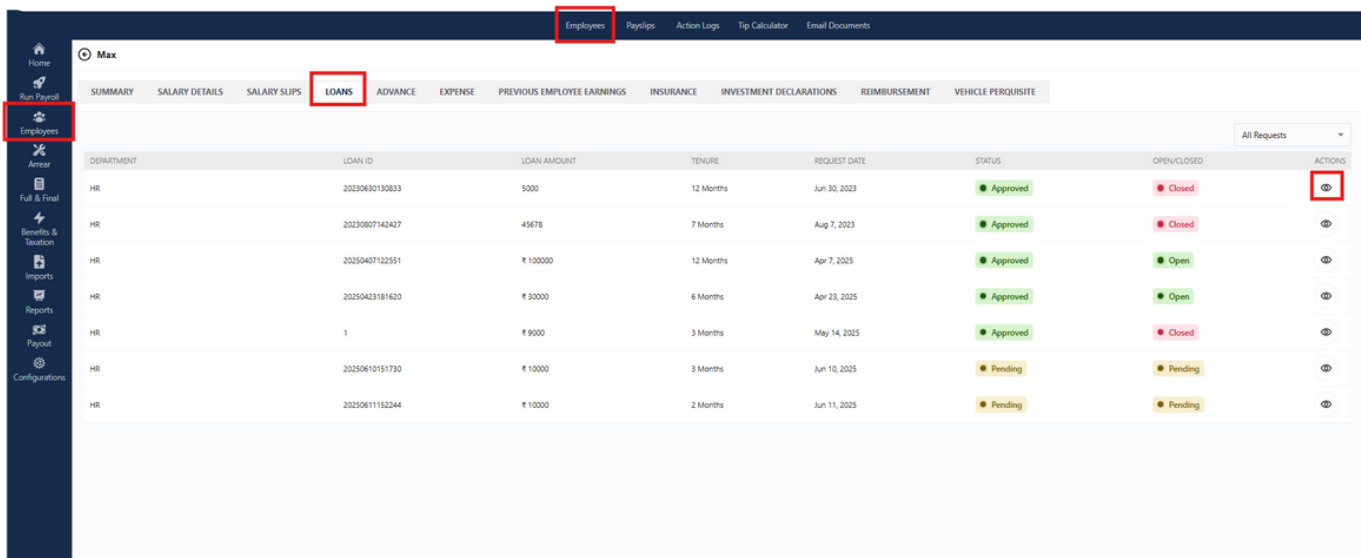
802

500

Salary Slips: Download salary slips, filter by year/entity. Regenerate or email slips. Download the zip for bulk.



Loans: Breakdown of loans with filters.
View/Edit EMI/Tenure details of the Loan by clicking the one-eye option.



Advance

Advance view function helps to view the department, amount, and status. Where Admin can:

- View EMI plan.
- Edit EMI and tenure.

The screenshot shows the 'Advance' view with the following data:

EMPLOYMENT	LOAN ID	LOAN AMOUNT	TENURE	REQUEST DATE	STATUS	OPEN/CLOSED	ACTIONS
HR	20250507121251	₹ 3000	2 Months	May 5, 2025	Rejected	Rejected	[Action]
HR	20250507121251	₹ 6000	1 Month	May 27, 2025	Approved	Closed	[Action]

Advance Details Modal:

Loan ID: 20250507121251

Employee Name: [Name], Employee Code: [Code], Department: [Dept]

Joining Date: [Date], Advance Amount: ₹ 3000, Interest Rate: %

Advance EMI Details:

EMI MONTH	EMIPMENT AMOUNT	EMI AMOUNT	INTEREST AMOUNT	PRINCIPAL AMOUNT
No records found				

Expenses

Breakdown of expenses, including status and amounts. View via the action button.

The screenshot shows the 'Expenses' view with the following data:

EXPENSE NUMBER	EXPENSE TITLE	REQUESTED AMOUNT	APPROVED AMOUNT	REQUEST RAISED ON	PAY STATUS	ACTIONS
TESEC-10225	24.06.2025	2340	2340	Jun 24, 2025	Unpaid	[Action]
TESEC-10212	verygooduniversity	4000	4000	May 22, 2025	Paid	[Action]
TESEC-10211	test56789000	2000	2000	May 22, 2025	Paid	[Action]
TESEC-10199	Today	360	160	May 8, 2025	Paid	[Action]
TESEC-10198	Try	440	440	May 8, 2025	Paid	[Action]
TESEC-10197	test	122744	500	May 8, 2025	Paid	[Action]

Expense Details (TESEC-10199) Modal:

EXPENSE TYPE	BILL NO.	DATE FROM	DATE TO	REQUESTED AMOUNT	APPROVED AMOUNT
FOOD		May 8, 2025	May 8, 2025	200	0
TRAVEL		May 8, 2025	May 8, 2025	160	160

Previous Employee Earnings: Details of the last employer's earnings, TDS, and other tax info.

The screenshot shows the 'Previous Employee Earnings' view with the following data:

LAST ORGANIZATION NAME	LAST TOTAL GROSS AMOUNT	LAST TOTAL TDS AMOUNT	FINANCIAL YEAR	CREATED ON	CREATED BY	UPDATED ON	UPDATED BY
akash	1000000	2000	2023	2023-10-10 10:24:59	-	0000-00-00 00:00:00	-

Investment Declaration

Admins can:

- View & Edit pending/approved declarations.
- Add new declarations and proofs.

Monika Sharma

Download Zip

Add Investment

EMPLOYEE	SECTION NAME	DEDUCTION HEAD	REQUESTED DECLARATION	ACCEPTED DECLARATION	PROOF	STATUS	ACTION
Monika Sharma	80C	Mutual Fund	15000	15000	File not Available	Pending	[Edit]
Monika Sharma	80C	Public Provident Fund	0	100000	File not Available	Rejected	[Edit]
Monika Sharma	80C	Arrears / previous PF	15000	15000	File not Available	Pending	[Edit]
Monika Sharma	80C	Life Insurance Premium	35000	35000	File not Available	Pending	[Edit]
Monika Sharma	80C	Deposit in National S		5555	File not Available	Pending	[Edit]
Monika Sharma	80C	Children Tuition Fees		2000	File not Available	Pending	[Edit]
Monika Sharma	80C	Equity Linked Saving		9000	File not Available	Pending	[Edit]
Monika Sharma	80C	NABARD Notified/R		15000	File not Available	Pending	[Edit]

Amount * 15000

Remark

☐ Send Notification

Drag & drop here or Choose file

Cancel Save

Reimbursement

Admins can:

- View & Edit reimbursement details.
- Add new reimbursement in the data with attachment proofs.

Max

Reimbursement Details

HEAD NAME	ELIGIBILITY AMOUNT	TOTAL CLAIMED AMOUNT	TOTAL APPROVED CLAIMED AMOUNT	UNCLAIMED AMOUNT	CLAIMED REQUESTS	ACTION
Driver Salary	24600	123	123	24677	VIEW	[Edit]

Head Name : Driver Salary

Unclaimed Amount : 24677

Amount * 24677

Remark

☐ Send Notification

Drag & drop here or Choose file

Cancel Save

Vehicle Perquisites

Configure vehicle details affecting payroll taxation:

- Owner
- Maintenance payer
- Engine capacity
- Driver provided
- Effective from
- Usage purpose

Note: Taxability is calculated as per these settings.

Employees | Payslips | Action Logs | Tip Calculator | Email Documents

VEHICLE PERQUISITE

Vehicle Owned By: Employee

Maintenance By: Employer

Vehicle Cubic Capacity: UPTO 1600

Is Driver Provided: Yes

Applicable From: 01 Nov 2023

Edit Vehicle Perquisite

Vehicle Owned By: Employee

Maintenance By: ☐ Employee ☒ Employer

Vehicle Cubic Capacity: ☒ UPTO 1600 ☐ ABOVE 1600

Is Driver Provided: ☒ Yes ☐ No

Purpose Of Use: ☒ Personal ☐ Office ☐ Both

Applicable From: Nov-2023

Edit Details

Pay Slips

The Payslip section allows the admin to **view** and **download employee payslips**. This section offers flexibility through multiple **filters** such as **entity, location, status, department, designation, and year**.

Admins can also search directly by employee name or code (separated by commas) for quick access.

Note: The search bar becomes active only after selecting both the entity and the month.

Buttons on Pay slip Page in Employee	
<div>Unpublish Payslips</div> <div>Publish Payslips</div>	Unpublish Payslip & Publish Payslip: Admin Publish/Unpublish Payslip: by clicking on the Publish and Unpublish Payslip button
<div>Regenerate Payslips</div>	Regenerate Payslip: Regenerate missing or ungenerated salary slips for employees.
<div>Email Payslips</div> <p>When you Click on this button this will pop-up.</p> <div> <p>Kindly confirm the action you want to take.</p> <ul style="list-style-type: none"> You may notify the employee about their payslip via push notification or email notification. Please choose the preferred option(s). If you click the Push Notification option, only a notification message will be sent to the employee. If you click the Email Notification option, only a notification email will be sent to the employee. If you click the Email Payslip option, payslip will be sent to the employee. If you checked the Include Personal Email option, the email notification or payslip will also be sent to the employee's personal email as well. <p><input type="checkbox"/> Include Personal Email</p> <p>Send Push Notification Send Email Notification Email Payslip</p> </div>	Email Payslips <ul style="list-style-type: none"> Send payslips to respective employees via their HRMS-registered email IDs. You may notify the employee about their payslip via push notification or email notification. Please choose the preferred option(s). If you click the Push Notification option, only a notification message will be sent to the employee. If you click the Email Notification option, only a notification email will be sent to the employee. If you click the Email Payslip option, the payslip will be sent to the employee. <p>If you checked the Include Personal Email option, the email notification or payslip will also be sent to the employee's personal email as well.</p>
<div>Download Zip</div>	Download all payslips in bulk as a ZIP folder

Payroll Management System - Payroll Management

Employees Payroll Action Logs Tip Calculator Email Documents

Home Payroll Employees Payroll Management

Entity: All Entities Department: All Department Sub-Department: All Sub-Department Designation: All Designation

Location: All Location Employee Branch: Employee Status: All Employees Month/Year: May-2025

Payroll Status: Generated Search Employee Codes (Separated by Commas ',') Search Employee

Unpublish Payrolls Publish Payrolls Regenerate Payrolls Email Payrolls Download Zip

EMPLOYEE	DEPARTMENT	DESIGNATION	PUBLISHED STATUS	GENERATED STATUS	EMAIL SENT	ACTION
ot testing 434096AD 221134511	HR	Manager	Not Published	Generated	No	👁️ ⬇️
ot required 945102010 221134511	HR	Executive	Not Published	Generated	No	👁️ ⬇️
Normal payroll MANUA ARB06GCH088295...	HR	Analyst	Not Published	Generated	No	👁️ ⬇️
TEST EMP CODE TEST-TEST	HR	Analyst	Not Published	Generated	No	👁️ ⬇️
test of required OT REQUIRED	HR	Assistant Vice President	Not Published	Generated	No	👁️ ⬇️
1707410283411 hjnge... 6WVA66K3 221008344	HR	Executive	Not Published	Generated	No	👁️ ⬇️
1707410339396 before... W480G72U 221008344	HR	CEO	Not Published	Generated	No	👁️ ⬇️
1707410846306 wuotpl... 7084K022 221017284	HR	assistant manager	Not Published	Generated	No	👁️ ⬇️
1707410930645 trngel... 0130406 221010594	HR	Analyst	Not Published	Generated	No	👁️ ⬇️
1707410377776 asgpm... 6008PMA 221002744	HR	CEO	Not Published	Generated	No	👁️ ⬇️
1707410906308 hngel... Y12K101Q 221013044	HR	Senior Manager	Not Published	Generated	No	👁️ ⬇️
170741091964 yfghys... 7Y930Y4 221021344	HR	assistant manager	Not Published	Generated	No	👁️ ⬇️
170741092077 gasdu... 452204K3 221011244	HR	CEO	Not Published	Generated	No	👁️ ⬇️

Action Logs

The Action Logs section offers the admin a detailed view of all modifications made by fellow administrators related to payroll, particularly CTC changes.

Admins can apply filters to narrow results based on entity and event type, such as CTC Add, Revise CTC, Appraisal, and others. This enables targeted audit tracking for decision-making.

Super Admin can select one action type when the list type is 'All'

Employees Payroll Action Logs Tip Calculator Email Documents

Action Logs

Entity: All Entities From Date: 15-Apr-2025 To Date: 24-Jun-2025

Action: All Action, Log +4 more Search Employee Codes (Separated by Commas ',') Action By: All Employees

Download Excel Search

Super Admin can select one action_type when list type is 'All'

EMPLOYEE NAME	DEPARTMENT	ACTION TYPE	ACTION DESCRIPTION	ACTION DATE	ACTION TIME	ACTION TAKEN BY	ACTION
Akib AKI-200	Admin	Log	LOP Days updated to 0 for the month of June 2025	24 Jun, 2025	8:18 AM	Max	
Akib AKI-200	Admin	Log	LOP Days updated to 0 for the month of May 2025	24 Jun, 2025	6:43 AM	Max	
Adi ADI-200	Finance	Log	LOP Days updated to 0 for the month of April 2025	24 Jun, 2025	6:30 AM	Max	
Aman AMI-200	TEST	Log	LOP Days updated to 0 for the month of June 2025	24 Jun, 2025	4:16 AM	Max	
Aman AMI-200	TEST	Log	LOP Days updated to 0 for the month of May 2025	24 Jun, 2025	4:15 AM	Max	

Salary Comparison View

- By clicking the 'Salary Comparison' action button, the admin can view a detailed breakdown and bifurcation of employee CTCs in a comparative format.

Home

Run Payroll

Employees

Assign

Full & Final

Benefits & Deduction

Imports

Reports

Payout

Configurations

Employees

Paylips

Action Logs

Tip Calculator

Email Documents

Entity
All Entities

From Date

To Date

Action

Search Employee Codes (Separated by Commas ',')

Action By
Me

Download Excel

Search

Employees(30)

EMPLOYEE NAME	DEPARTMENT	ACTION TYPE	ACTION DESCRIPTION	ACTION DATE	ACTION TIME	ACTION TAKEN BY	ACTION
Akib AK_099	Admin	Ctc Changes	Salary Mapped with structure "No Compliance copy".	24 Jun, 2025	12:12 PM	Max	
Adil AD_090	Finance	Ctc Changes	Salary Mapped with structure "No Compliance copy".	24 Jun, 2025	12:00 PM	Max	
Aman AM_098	TEST	Ctc Changes	Salary restructure from name "Executive PF Limit" to "No Compliance copy".	24 Jun, 2025	11:23 AM	Max	
Aman AM_098	TEST	Ctc Changes	Salary updated with structure "Executive PF Limit"	24 Jun, 2025	10:06 AM	Max	
Aman AM_098	TEST	Ctc Changes	Salary Mapped with structure "New800".	24 Jun, 2025	9:43 AM	Max	
Akib AK_099	Admin	Lop	LOP Days updated to 0 for the month of June 2025	24 Jun, 2025	8:18 AM	Max	
Akib AK_099	Admin	Lop	LOP Days updated to 0 for the month of May 2025	24 Jun, 2025	6:43 AM	Max	
Adil AD_090	Finance	Lop	LOP Days updated to 0 for the month of April 2025	24 Jun, 2025	6:30 AM	Max	
Aman AM_098	TEST	Lop	LOP Days updated to 0 for the month of June 2025	24 Jun, 2025	4:16 AM	Max	
Aman AM_098	TEST	Lop	LOP Days updated to 0 for the month of May 2025	24 Jun, 2025	4:15 AM	Max	
Aman AM_098	TEST	Lop	LOP Days updated to 0 for the month of April 2025	24 Jun, 2025	4:15 AM	Max	
Aman							

Akib(AK_099)


Monthly Salary: ₹ 50000

Monthly Gross Salary: ₹ 49300

Monthly Deduction: ₹ 1800

Monthly Net Payable: ₹ 47500

Bonus



No Heads Found

Earnings

BASIC	HRA	New_Head	Laptop Allowance
₹ 30000	₹ 15000	₹ 4300	₹ 0

Deductions

Employee ESI	PF	PT	Indicative Group
₹ 0	₹ 1800	₹ 0	₹ 0

Compliances

Medical Allowance
₹ 700

Allowance

Special Allowance....	LTA	CCA	Covenyance
₹ 0	₹ 0	₹ 0	₹ 0
Medical	Uniform Allowance	Food Allowance	Conveyance Allowance
₹ 0	₹ 0	₹ 0	₹ 0

4. Arrear

In the Arrears section, payroll administrators can manage and process employee arrears in three easy steps:

1. **Arrear Info**
2. **Preview & Generate**
3. **Summary**

Step 1: Arrear Info

This section displays a list of all applicable employees across entities. The following fields are visible:

- **Entity:** (e.g., Ashok Auto Sales Ltd + 19 more)
- **Month-Year:** Jun-2025
- **Additional Filters:** More options (designation, department, code, etc.)

Code	Employee Name	Designation	Department	Paid On	Arrear Salary	Arrear Days	Arrear Status
------	---------------	-------------	------------	---------	---------------	-------------	---------------

Admins can select employees and delete previously processed arrears if required before proceeding.

Click **Next** to move to the Preview & Generate step.

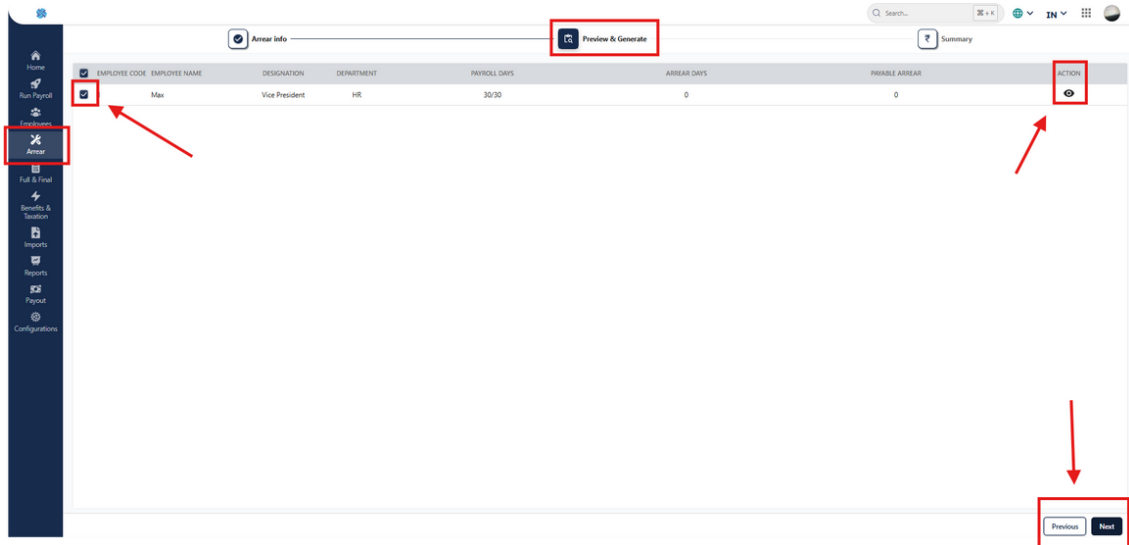
The screenshot shows the 'Arrear Info' interface. The top bar has tabs for 'Arrear Info', 'Preview & Generate', and 'Summary'. The 'Arrear Info' tab is active. Below the tabs, there are filters for 'Entity' (All Entity, Ashok Auto Sales Ltd + 19 more) and 'Month-Year' (Jun-2025). A 'Search' button is on the right. Below the filters is a table with the following columns: CODE, EMPLOYEE NAME, DESIGNATION, DEPARTMENT, PAID ON, ARREAR SALARY, ARREAR DAYS, and ARREAR STATUS. The table contains one row with the following data: 1, Max, Vice President, HR, Dec 2025, 0.33, 0, Paid. A red box highlights the 'Arrear Info' tab, and another red box highlights the 'Delete Processed Arrear' button. A red arrow points to the 'Next' button at the bottom right.

Step 2: Preview & Generate

Here you can preview the calculated arrear details for each selected employee.

Employee Code	Employee Name	Designation	Department	Payroll Days	Arrear Days	Payable Arrear	Action
---------------	---------------	-------------	------------	--------------	-------------	----------------	--------

Clicking the **View** button in the Action column displays a breakdown of the arrear computation. After review, click **Next** to finalize the process.



Step 3: Summary

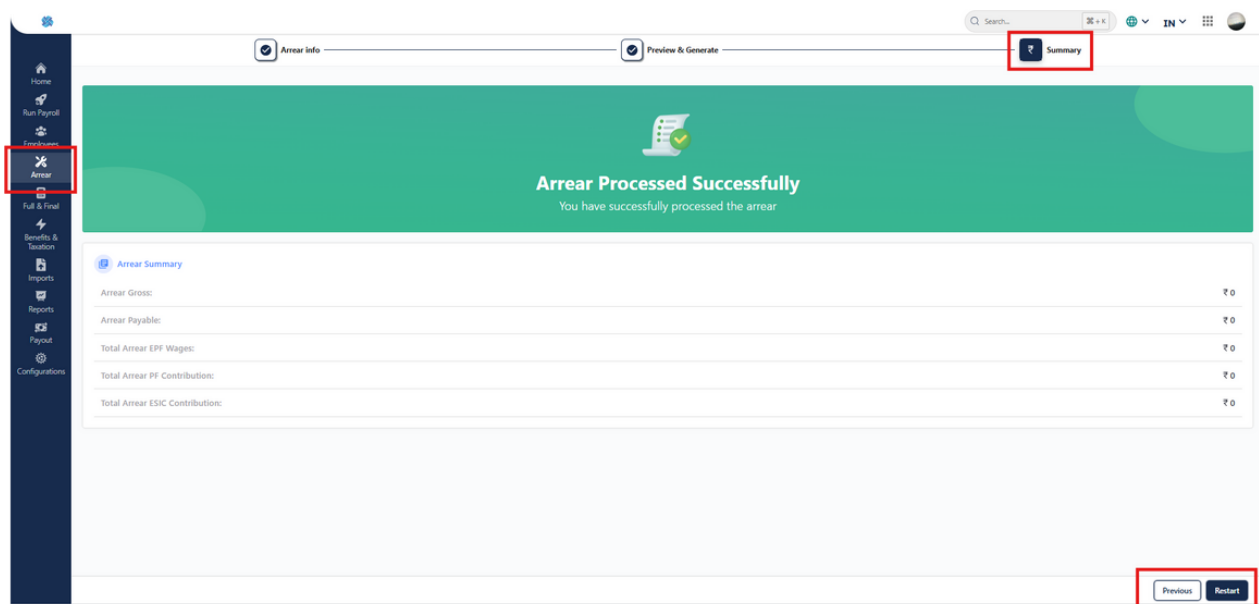
Upon successful processing, the system shows a confirmation message:

Arrear Processed Successfully


An Arrear Summary is also generated with the following fields with, E,g Values:

- **Arrear Gross:** ₹ 1000,000
- **Arrear Payable:** ₹ 80,000
- **Total Arrear EPF Wages:** ₹ 75,000
- **Total Arrear PF Contribution:** ₹ 8000
- **Total Arrear ESIC Contribution:** ₹ 900

This marks the end of the arrear processing flow.



5. Full & Final (F&F)

Description: Process exit settlements. 

Features:

1. Pending for F&F
2. F&F Completed

Overview

The Full & Final (F&F) settlement module is designed to facilitate accurate and streamlined offboarding settlements. Admins can manage everything from payroll processing, TDS, reimbursements, leave encashments, gratuity, and more for resigned employees.

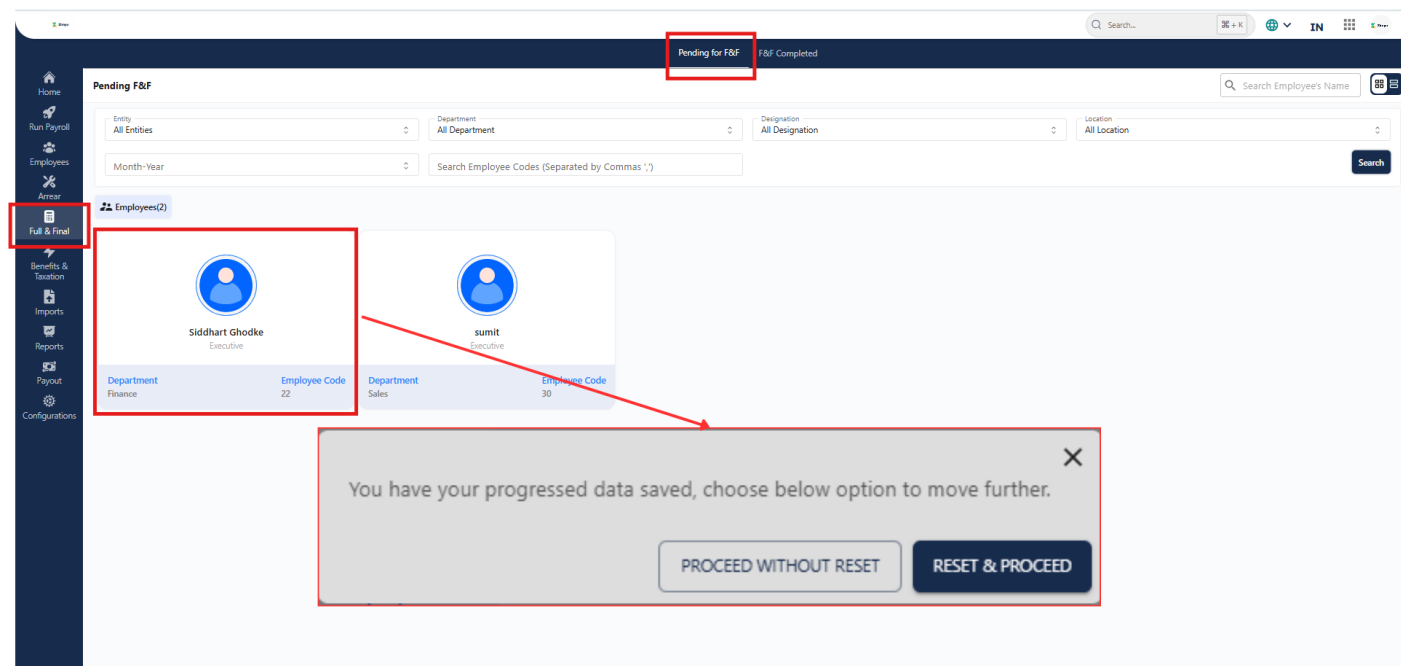
Search and Select Employee

- Use filters like entity, department, designation, location, and month-year.
- Enter employee names or codes (comma-separated) in the search bar. **Progressed Data Handling**

On selecting an employee, a pop-up appears with two options:

- **Proceed Without Reset**
- **Reset & Proceed**

Choose “Proceed Without Reset” to continue the F&F process with previously saved data.




1. Pending for F&F

Process Stages

The F&F Checklist module includes the following tabs:

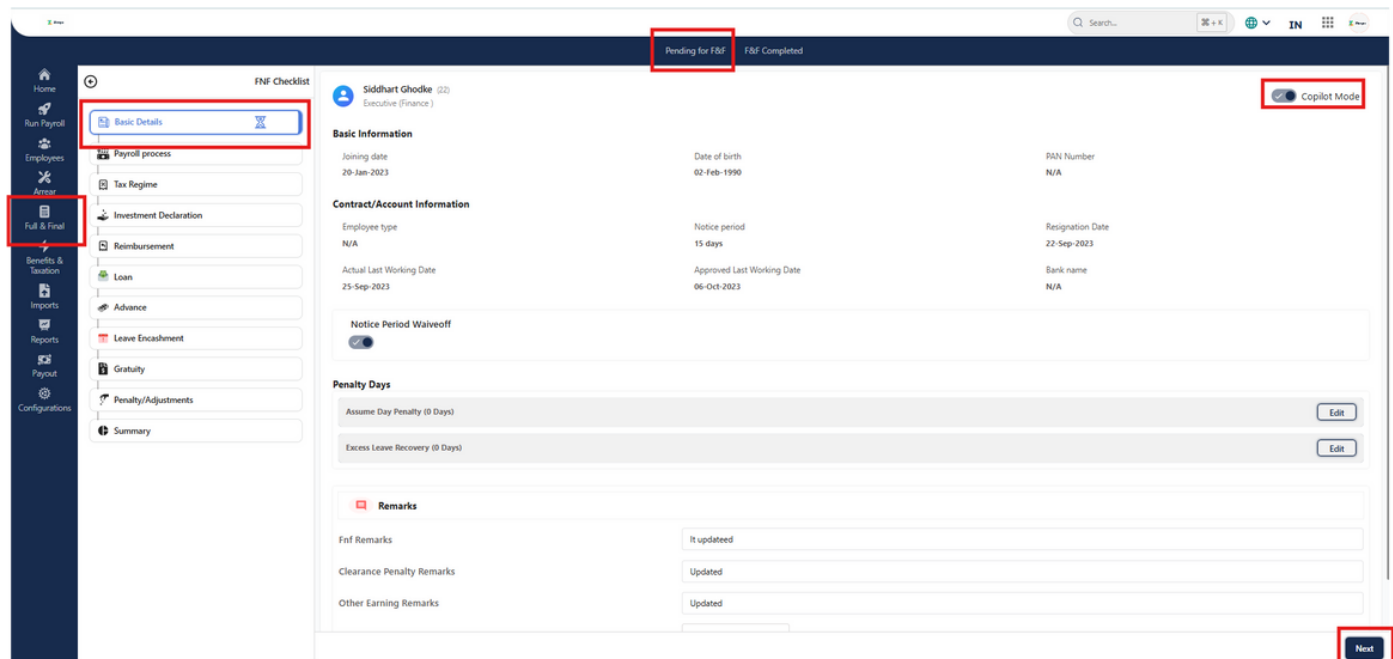
1. Basic Details: This section contains comprehensive information about the employee such as **personal details, joining date, date of birth, PAN, and bank information.**

Admins can configure the following:

- Notice Period Waiver (toggle), 
Notice Period Lieu By (Employee) (Employer)
- Penalty Days (**editable**),
- Assume Day (**editable**) Penalty, Excess Leave Recovery, and enter remarks under F&F, Clearance Penalty, and Other Earnings.
- Admins must also select the Reference Month for TDS filing.

Copilot Mode

- Located on the F&F Checklist page, the **Copilot Mode Button** enables smart process automation.
- When turned **ON**, it will **automatically skip irrelevant steps** in the F&F process,



F&F Checklist

Basic Details

Payroll process

Full & Final

Basic Information

Joining date: 20-Jan-2023
Date of birth: 02-Feb-1990
PAN Number: N/A

Contract/Account Information

Employee type: N/A
Notice period: 15 days
Resignation Date: 22-Sep-2023
Actual Last Working Date: 25-Sep-2023
Approved Last Working Date: 06-Oct-2023
Bank name: N/A

Notice Period Waiveoff

Penalty Days

Assume Day Penalty (0 Days)
Excess Leave Recovery (0 Days)

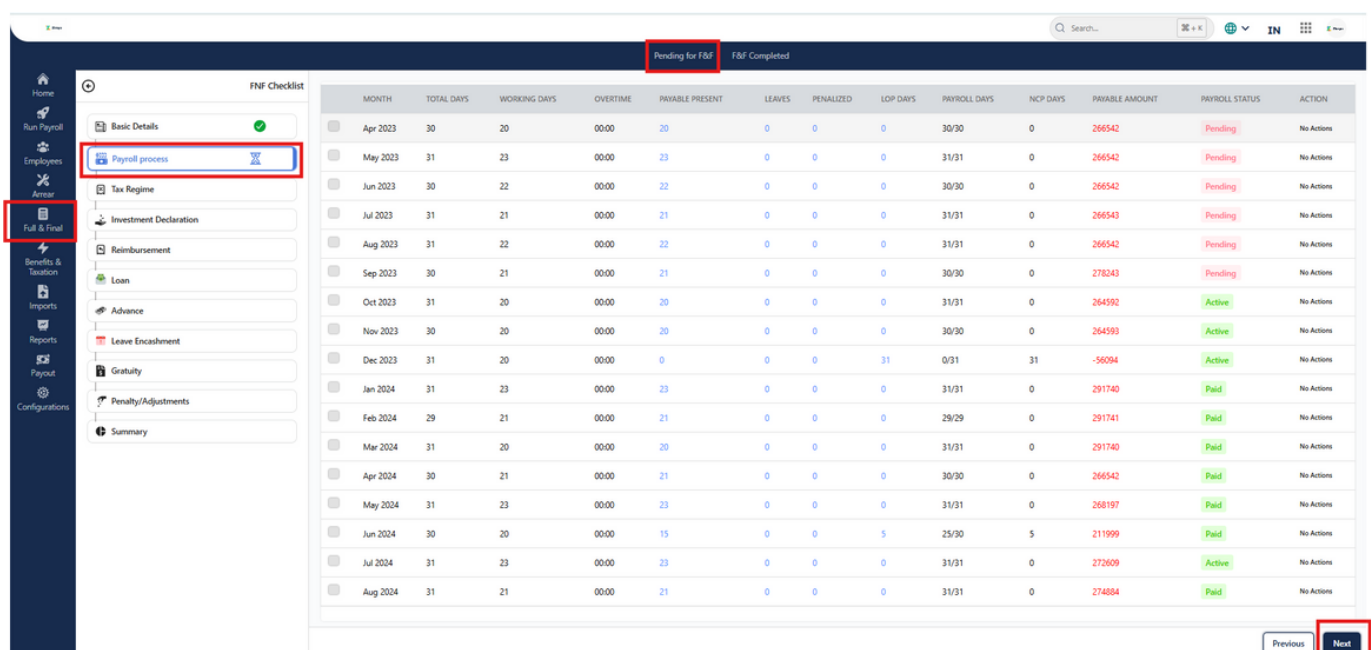
Remarks

Fnf Remarks: It updated
Clearance Penalty Remarks: Updated
Other Earning Remarks: Updated

Next

2. Payroll Process: Monthly breakdown of payroll with working days, payroll status, payable amount, etc.

Review the details and click on **Next** for the next process.



Payroll Process

MONTH	TOTAL DAYS	WORKING DAYS	OVERTIME	PAYABLE PRESENT	LEAVES	PENALIZED	LOP DAYS	PAYROLL DAYS	NCP DAYS	PAYABLE AMOUNT	PAYROLL STATUS	ACTION
Apr 2023	30	20	00:00	20	0	0	0	30/30	0	266542	Pending	No Actions
May 2023	31	23	00:00	23	0	0	0	31/31	0	266542	Pending	No Actions
Jun 2023	30	22	00:00	22	0	0	0	30/30	0	266542	Pending	No Actions
Jul 2023	31	21	00:00	21	0	0	0	31/31	0	266543	Pending	No Actions
Aug 2023	31	22	00:00	22	0	0	0	31/31	0	266542	Pending	No Actions
Sep 2023	30	21	00:00	21	0	0	0	30/30	0	278243	Pending	No Actions
Oct 2023	31	20	00:00	20	0	0	0	31/31	0	264592	Active	No Actions
Nov 2023	30	20	00:00	20	0	0	0	30/30	0	264593	Active	No Actions
Dec 2023	31	20	00:00	0	0	0	31	0/31	31	-56094	Active	No Actions
Jan 2024	31	23	00:00	23	0	0	0	31/31	0	291740	Paid	No Actions
Feb 2024	29	21	00:00	21	0	0	0	29/29	0	291741	Paid	No Actions
Mar 2024	31	20	00:00	20	0	0	0	31/31	0	291740	Paid	No Actions
Apr 2024	30	21	00:00	21	0	0	0	30/30	0	266542	Paid	No Actions
May 2024	31	23	00:00	23	0	0	0	31/31	0	268197	Paid	No Actions
Jun 2024	30	20	00:00	15	0	0	5	25/30	5	211999	Paid	No Actions
Jul 2024	31	23	00:00	23	0	0	0	31/31	0	272609	Active	No Actions
Aug 2024	31	21	00:00	21	0	0	0	31/31	0	274884	Paid	No Actions

Next

3. **Tax Regime:** Choose between the Old and New Tax Regime. Impacts investment declarations.

Note: Changing the tax regime will impact on employee tax amount.

Choose Your Preferred Tax Regime

Select the tax regime that best suits your financial strategy

Old Regime

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.

New Regime

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.

Note: Changing the tax regime will impact on employee tax amount.

Previous **Next**

4. **Investment Declaration:** Editable if Old Regime is selected. New regime skips this.

- If the **Old Regime** is selected, this section becomes editable.
- If the **New Regime** is selected, the investment declaration section is skipped.
- If **Copilot Mode** is disabled, the investment section is visible regardless of regime.
- Admins can click **Add Investment** to open a pop-up with the following fields:
 - **Financial Year** (dropdown)
 - **Choose Declaration** (dropdown with options like PPF - 80C, Mutual Fund - 80C, etc.)
 - **Yearly Amount** (numeric input)
 - **Upload Proof:** Drag & drop or file selector for attaching supporting documents.
- The section includes filters for **Year** and **Status** (Approved, Pending, Rejected, Re-Approval).

Financial Year *

Choose Declaration *

Yearly Amount *

Drag & drop here or [Choose File](#)

Cancel Save

Previous Next

5. Reimbursement: Displays claimed reimbursements pending during the F&F stage.

Displays claimed reimbursements pending during the F&F stage.

- If **Copilot Mode** is enabled, these details will be skipped because there is no **Reimbursement for the employee**.
- And if **Copilot Mode** is disabled, the **Reimbursement** section will be visible regardless of any **Reimbursement data**.

Reimbursement Details

HEAD NAME	ELIGIBILITY AMOUNT	TOTAL CLAIMED AMOUNT	TOTAL APPROVED CLAIMED AMOUNT	UNCLAIMED AMOUNT	CLAIMED REQUESTS	ACTION
No records found						

Previous Next

6. Loan: List of outstanding loans and repayment history.

- If **Copilot Mode** is enabled, these details will be skipped because there is no **Loan for the employee**.
- And if **Copilot Mode** is disabled, the **Loan** section will be visible regardless of any **Loan data**.

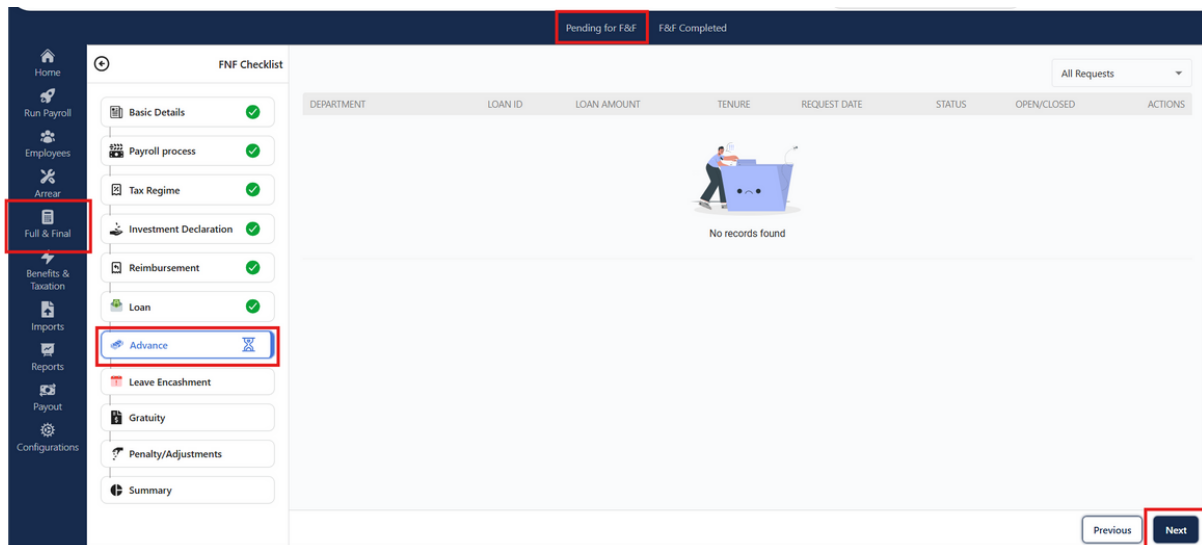
Loan

DEPARTMENT	LOAN ID	LOAN AMOUNT	TENURE	REQUEST DATE	STATUS	OPEN/CLOSED	ACTIONS
No records found							

Previous Next

7. **Advance:** Shows advance payments made, EMI plans, and pending amounts.

- If **Copilot Mode** is **enabled**, these details will be skipped because there is no **advanced data for the employee**.
- And if **Copilot Mode** is disabled, the **Advance** section will be visible regardless of any **Reimbursement data**.

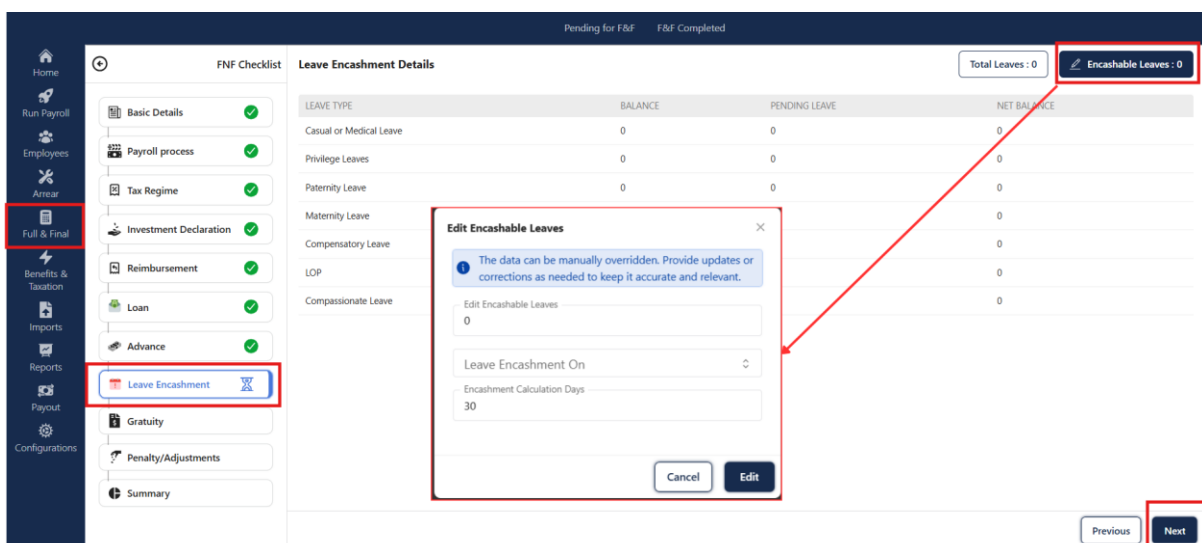


8. **Leave Encashment:**

- Displays leave balances across types such as Casual, Privilege, Maternity, etc.
- Admins can override the data manually using the **Edit Encashable Leaves**.

Edit Encashable Leaves Pop-up Details:

- **Edit eave Encashment On:** Select from Basic, CTC, or Gross.
- **Encashment Calculation Days:** Fill in the number of days.
- Admins can update values to reflect actual entitlements.



9. Gratuity: Auto-fetched from service duration; admin enters final gratuity amount.

The screenshot shows the 'Gratuity Details' form within the 'F&F Checklist' section. The left sidebar contains navigation links: Home, Run Payroll, Employees, Arrear, Full & Final (highlighted), Benefits & Taxation, Imports, Reports, Payout, and Configurations. The main area displays a checklist of items with green checkmarks: Basic Details, Payroll process, Tax Regime, Investment Declaration, Reimbursement, Loan, Advance, Leave Encashment, Gratuity (highlighted), Penalty/Adjustments, and Summary. The 'Gratuity Details' form includes fields for Last Working Date (25-Sep-2023), Joining Date (20-Jan-2023), Total Year Of Experience (1 years), Taxable Gratuity Amount (N/A), and a red-bordered input field for GRATUITU AMOUNT with the value 0. At the bottom right, there are 'Previous' and 'Next' buttons, with 'Next' highlighted.

10. Penalty & Adjustments: Allows addition of dynamic fields like bonuses, penalties, recoveries, Leave Encashment Amount, Notice Period Penalty, Clearance Penalty, Asset, Penalty, Other Earnings, Joining Bonus Recovery, Assume Day Penalty, Excess Leave Recovery, Unclaimed Reimbursement.

Add Dynamic Fields: The User can add a new dynamic head live Incentive.

The screenshot shows the 'Penalty & Adjustments' form. The left sidebar is the same as in the previous screenshot, with 'Penalty/Adjustments' highlighted. The main area displays a table with columns: HEAD NAME, AMOUNT, and EDITABLE AMOUNT. The table lists various items: Bonus, Leave Encashment Amount, Notice Period Penalty, Clearance Penalty, Asset Penalty, Other Ea, Joining B, Assume, Excess L, and Unclaimed Reimbursement. A modal titled 'Computed TDS Amount' is open, showing 'TDS AMOUNT 41164' and 'Cancel'/'Submit' buttons. A red arrow points from the 'Submit' button to the 'Next' button at the bottom right of the form. The 'Next' button is highlighted. There is also an 'Add Dynamic Head' button at the top right of the form area.

The screenshot shows the 'Add Dynamic Fields' modal. It has a title bar with a close button. Below the title, there is a text input field labeled 'Dynamic Heads' with the value 'Incentive'. Below this, there is a list of items, with 'Incentive' selected.

After submission, the system generates TDS values and marks the F&F process as completed.

11. Summary: Displays total salary, TDS, gratuity, and adjustments. Shows the final payable amount. Admin submits after confirmation.

Once you Click on submit, you can find the Suprated employee in **F&F Completed**

The screenshot displays the 'F&F Summary' page. The left sidebar contains navigation options: Home, Run Payroll, Employees, Arrear, Full & Final (highlighted), Benefits & Taxation, Imports, Reports, Payout, and Configurations. The main content area is titled 'F&F Checklist' and shows a list of items with green checkmarks: Basic Details, Payroll process, Tax Regime, Investment Declaration, Reimbursement, Loan, Advance, Leave Encashment, Gratuity, and Penalty/Adjustments. Below this, the 'Employee Details' section shows information for Siddhart Ghodke, including Employee Code 22, Department Finance, and Designation Executive. The 'Salary Hold Months' section shows a table with columns for Month, Gross Salary, Net Salary, and TDS. The 'Last Month Salary Details' section also shows a similar table. The 'Penalty & Adjustments' section shows a table with columns for Head Name and Amount. At the bottom right, there are 'Previous' and 'Submit' buttons, with 'Submit' being highlighted.

2. F&F Completed

In this section, the admin can view all employees for whom the F&F process has been completed.

Note: The Rollback button is not visible for employees settled through payout.

- Employees are displayed as cards. Clicking the **kebab menu** (three-dot icon) on each card reveals the following options:
 - Roll Back F&F:** Reopens the F&F process for the selected employee, allowing the admin to make modifications.
 - Download F&F Statement:** Exports the employee's F&F summary in PDF format, including salary breakdowns and final settlements.
 - Re-settlement:** Enables the admin to revise earnings and deductions if any errors or updates are required. After adjustments, click **Generate** to finalize the corrections.

This section ensures transparency, editability, and accuracy of offboarding financials.


The screenshot displays the 'F&F Completed' page. The left sidebar contains navigation options: Home, Run Payroll, Employees, Arrear, Full & Final (highlighted), Benefits & Taxation, Imports, Reports, Payout, and Configurations. The main content area is titled 'F&F Completed' and shows a search bar with filters for Entity, Department, Designation, and Location. Below the search bar, there is a list of employees. The first employee, Shweta Rajoria, is highlighted, and a kebab menu is open showing options: Roll Back F&F, View FNF Sheet, Download F&F Statement, and Re-Settlement. The other employees listed are Mohit Gupta and Manish Gautam. At the bottom, there are buttons for 'Previous' and 'Submit'.

- Roll Back F&F: Reopens the F&F process for the selected employee, allowing the admin to make modifications.
- View & Download F&F Statement: Exports the employee’s F&F summary in PDF format, including salary breakdowns and final settlements.

View Slip

Sales XIII

Gurgaon, Haryana



SETTLEMENT SHEET				Date: 21st Aug, 2024
Employee no.	64	Date of Joining	5th Apr, 2023	
Name	Mohit Gupta	Date of Resignation	18th Sep, 2023	
PAN		UAN		
Designation	Executive	Last Working Day	18th Sep, 2023	
Department	Management	No. of Payable Days	18	
Exit Reason	Separated	IPSC		
Account Number				
Hold Month-Year		Amount		
Jun 2023		269610		
Sep 2023		208614		
Salary/Wages for the month of		Master	Paid	Payable Sep,2023
1. Salary				
BASIC		15000	-	9000
HRA		5000	-	3000
DA		500	-	300
Special Allowance		327550	-	196530
Earned CTC			-	210780

Re-settlement: Enables the admin to revise earnings and deductions if any errors or updates are required. After adjustments, click **Generate** to finalize the corrections.

Pending for F&F F&F Completed

Re-Settlement

Employee Name
Mohit Gupta

Employee Code
64

Location
Kolkata

FNF Settlement Date
21/08/2024

Department
Management

Designation
Executive

Joining Date
05/04/2023

Last Working Date
2023-09-18

Settled Amount
469224

Earnings

HEAD NAME	AMOUNT
Head Name * Statutory bonus	Amount 0
Head Name * Leave Encashment	Amount 0
Head Name * Other Bonus	Amount 0

Total Earning

0

Net Payable Amount

0

Deductions

HEAD NAME	AMOUNT
Head Name * TDS Recovery	Amount 0
Head Name * PT	Amount 0
Head Name * Other Deduction	Amount 0

Total Deduction

0

Generate

6. Benefits & Taxation

Admins can use filters to navigate through detailed employee data and perform actions with ease. This section offers a unified interface for managing :

- Loans
- Advance
- Reimbursement
- Expense
- Tax Deduction
- Restructure
- Other Earnings

Loans

Admins can view all employee loan applications and related data **using filters** such as location, entity, department, etc. **New loans can be uploaded via an Excel template:**

- **Bulk Create Loan:** Download template > Fill in details > Upload sheet.
- **View Loan Details:** The admin can view details and **edit the EMI/Tenure**
- **Download Proof:**

Bulk Create Loan: Download template > Fill in details > Upload sheet.

The screenshot displays the 'Loans' section of the system. At the top, there are navigation tabs: Loans, Advance, Reimbursement, Expense, Tax Declaration, Restructure, and Other Earnings. The 'Loans' tab is active. On the left sidebar, there are icons for Home, Run Payroll, Employees, Annual, Full & Final, Benefits & Taxation (highlighted), Imports, Reports, Payout, and Configurations. The main area shows a 'Bulk Upload Create Loan' modal with instructions: '1. Download Sample' and '2. Import REVENUE'. Below the modal is a table of loans with columns: EMPLOYEE NAME, DEPARTMENT, LOAN ID, LOAN AMOUNT, TENURE, REQUEST DATE, STATUS, OPEN/CLOSED, PROOF, and ACTIONS. The table lists several loans, including those for 'Max' and 'admin account'.

EMPLOYEE NAME	DEPARTMENT	LOAN ID	LOAN AMOUNT	TENURE	REQUEST DATE	STATUS	OPEN/CLOSED	PROOF	ACTIONS
Max							Closed		
Max							Closed		
Max							Open		
Max	HR	20250423181620	₹ 30000	6 Months	Apr 23, 2025	Approved	Open		
Max	HR	1	₹ 9000	3 Months	May 14, 2025	Approved	Closed		
Max	HR	20250610151730	₹ 10000	3 Months	Jun 10, 2025	Approved	Closed		
Max	HR	20250611152244	₹ 10000	2 Months	Jun 11, 2025	Approved	Closed		
admin account	HR	46666	\$ 2000	12 Months	Jul 22, 2024	Approved	Open		
admin account	HR	20240814104514	\$ 500	3 Months	Aug 14, 2024	Approved	Closed		

View Loan Details: The admin can view details and **edit EMI/Tenure**

The screenshot displays the 'Loans' section of the system. At the top, there are navigation tabs: Loans, Advance, Reimbursement, Expense, Tax Declaration, Restructure, and Other Earnings. The 'Loans' tab is active. On the left sidebar, there are icons for Home, Run Payroll, Employees, Annual, Full & Final, Benefits & Taxation (highlighted), Imports, Reports, Payout, and Configurations. The main area shows a 'View Loan Details' modal for a specific loan. The modal displays the following details: Employee Name, Employee Code, Department, Joining Date, Loan Amount, Interest Rate, Approved Amount, Approved Tenure, Approved By, Approved On, Apply Reason, and Action Remarks. Below the modal is a table of loan details with columns: EMPLOYEE NAME, DEPARTMENT, LOAN ID, STATUS, OPEN/CLOSED, PROOF, and ACTIONS. The table lists several loans, including those for 'Max' and 'admin account'.

EMPLOYEE NAME	DEPARTMENT	LOAN ID	STATUS	OPEN/CLOSED	PROOF	ACTIONS
Max	HR	2023063015	Approved	Closed		
Max	HR	2023080714	Approved	Closed		
Max	HR	2025040715	Approved	Open		
Max	HR	2025042316	Approved	Open		
Max	HR	1	Approved	Closed		
Max	HR	2025061015	Approved	Closed		
Max	HR	20250611152244	Approved	Closed		
admin account	HR	46666	Approved	Open		
admin account	HR	20240814104514	Approved	Closed		

Refer Last Page this process is after viewing the EMI/Tenure

Edit EMI/Tenure

Edit EMI / Tenure

Applicable from *

☐ Close Loan

☐ Adjust Tenure

☐ Adjust EMI

☐ Upfront Payment

Advances

Admins can:

- Use the filter options to view the status of open to view Approve, Reject, Location, Entity, Department, Designation, Branch, and view details of advanced requests.
- **View & Edit** interest rate, advance amount, and EMI schedule.
- Use the eye icon for a detailed breakdown.
- Use the checkmark icon to approve and configure advances.
- Use the cross icon to reject requests.

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All Designation

Location

All Location

Employee Branch

Status

All Requests

Include Employee Codes (Separated by Commas ',')

EMPLOYEE NAME	DEPARTMENT	LOAN ID	STATUS	OPEN/CLOSED	PROOF	ACTIONS
Max 1	HR	202505071	Rejected	Rejected		
Max 1	HR	202505271	Approved	Closed		
admin account 20025	HR	202403171	Rejected	Rejected		
admin account 20025	HR	202405011	Approved	Open		
admin account 20025	HR	202501022	Pending	Pending		
Manu AHAB8FFKFL72958... MANUGA AHAB8FFKFL9126...	HR	202406091	Pending	Pending		
Deteroit 1321	HR	ad001	Approved	Closed		
Deteroit 1321	HR	202412311	Pending	Pending		
tallynormalcise MANUGA AJCOACBFGS183...	HR	98743w	Approved	Closed		

Advance Details

Loan ID: 2025052712051

Employee Name

Max 1

Employee Code

1

Department

HR

Joining Date

Dec 1, 2024

Advance Amount

₹ 6000

Interest Rate

0%

Approved Amount

₹ 6000

Approved Tenure

6 months

Approved By

HR

Approved On

2025-08-09 13:08:58

Apply Reason

Test

Action Remarks

Advance EMI Details

EMI MONTH

UPFRONT AMOUNT

EMI AMOUNT

INTEREST AMOUNT

PRINCIPAL AMOUNT

May 2025	-	₹ 1000	0-	₹ 1000
Jun 2025	-	₹ 1000	0-	₹ 1000
Jul 2025	-	₹ 1000	0-	₹ 1000
Aug 2025	-	₹ 1000	0-	₹ 1000
Sep 2025	-	₹ 1000	0-	₹ 1000
Oct 2025	-	₹ 1000	0-	₹ 1000

Loan ID: 2025052712051

Loan ID: 2025052712051

View EMI / Tenure

Edit EMI / Tenure

Applicable from *

☐ Close Loan

☐ Adjust Tenure

☐ Adjust EMI

☐ Upfront Payment

Reimbursement

- View eligible employees with filter options.
- Approve, reject, or view details of Reimbursement requests.
- **Freeze Reimbursement:** Select employees, submit to freeze, and add to salary.
- **Upload Reimbursement:** Use the Excel template to bulk upload reimbursement data.

Reimbursement

Entity: All Entity, Ashok Auto Sales Ltd +19 more | Department: All Department, Admin +17 more | Designation: All Designation, Analyst +38 more | Location: All Location, Assam +15 more

Branch: | Employee Status: Active Employee | Fin Year: 2025 | Status: | Search

Search Employee Codes (Separated by Commas ',')

Proof Status: | Search

Employees(2)

EMPLOYEE	SALARY HEAD	UNCLAIMED AMOUNT	APPROVED AMOUNT	CLAIMED AMOUNT	REASON	REMARK	DECLARED ON	ACTION TAKEN ON	INVOICE DATE	INVOICE NUMBER	PROOF	STATUS
<input type="checkbox"/> Max	Driver Salary	2667	2667		Updated		24-Jun-2025	24-Jun-2025	24-Jun-2025	41627	File not Available	Approved
<input type="checkbox"/> Max	Driver Salary	123	123				28-May-2025	28-May-2025			File not Available	Approved

Bulk Upload Reimbursement Declaration

1. Download sample
Use this template with pre-defined columns, and fill in your member data. [Download Sample](#)

2. Import XLS/XLSX
Check you've filled out the XLS/XLSX, import it. [Drag & drop here or Choose File](#)

Freeze Reimbursement: Select employees, submit to freeze, and add to salary.

Freeze Reimbursement

Reimbursement Freeze

Search Employee by Name

Entity: All Entities | Department: All Department | Designation: All Designation | Location: All Location | Employee Status: Active Employee | Employee Branch: | Search Employee Codes (Separa... | **Submit**

	EMPLOYEE CODE	EMPLOYEE NAME	STATUS
<input type="checkbox"/>	6WA466K3 221008344	1707410283411 hjigte yffcv	Unfrozen
<input type="checkbox"/>	W48OGF2U 2210085944	1707410339396 befcrq xpiugd	Unfrozen
<input type="checkbox"/>	7Q64ORZZ 2210172644	1707410846306 wuctpf khqlis	Unfrozen
<input type="checkbox"/>	013FGV6G 2210185044	1707410930645 tnngzf jsfqao	Unfrozen
<input type="checkbox"/>	65C6F3N4 2210203744	1707411037776 aopjmr wdypsk	Unfrozen
<input type="checkbox"/>	11ZK1D3Q 2210213044	1707411090638 ftoqnr oabryk	Unfrozen
<input type="checkbox"/>	7YE903Y4 2210213144	1707411091964 yfgbys popqvr	Unfrozen
<input type="checkbox"/>	4522SHCR 2210213244	1707411092077 gasxsu swyhmj	Unfrozen
<input type="checkbox"/>	HUJZCO7 2210213244	1707411092158 jbcbyk jrlidw	Unfrozen
<input type="checkbox"/>	SQKN82S9 2210213244	1707411092286 dsbpeo qlkmvs	Unfrozen
<input type="checkbox"/>	1H69MH7D 2210213244	1707411092816 chuiab qfygjr	Unfrozen
<input type="checkbox"/>	O6HS87LQ 2210213544	1707411095987 flqets mqelkf	Unfrozen
<input type="checkbox"/>	M7QRI83O 2210213644	1707411096029 agsgwf biefkv	Unfrozen
<input type="checkbox"/>	64UGA224 2210213644	1707411096389 isyqyp zadprx	Unfrozen

Approve, reject, or view details of Reimbursement requests.

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Freeze Reimbursement

Upload Reimbursement

Entity: All Branch

Department: Active Employee

Designation: Fin Year 2024

Location: Status

Search Employee Codes (Separated by Commas ',')

Proof Status

Search

Employees(t)

Approve

Reject

EMPLOYEE

SALARY HEAD

UNCLAIMED AMOUNT

Monika Sharma

DA

2208.33

Approved

Approved Amount *

Remark

Cancel

Approve

INVOICE TAKEN ON

INVOICE DATE

INVOICE NUMBER

PROOF

STATUS

16-Apr-2024

3426EED5FG

File not Available

Pending

Reject

Remark

Remark

Cancel

Reject

Expense

Admins can view and update the status of verified expense requests initiated by employees:

- Use filters (entity, branch, designation, date range).
- Use **Search** to view requests.
- View expense number, raised/approved amount, and status.
- **Eye icon**: View full expense details.
- **Bank Sheet**: Download filtered list in XLV format.

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Entity: All Entities

Department: All Department

Designation: All Designation

Location: All Location

Employee Status: All Employees

Employee Branch: All Employee Branch

Pay Status: All

Request Raised To Date: 15-Oct-2024

Request Raised From Date: 01-Aug-2024

Search Employee Codes (Separated by Commas ',')

Bank Sheet

Search

EMPLOYEE CODE

EMPLOYEE NAME

EMPLOYEE TYPE

EXPENSE NUMBER

EXPENSE TITLE

REQUESTED AMOUNT

APPROVED AMOUNT

REQUEST RAISED ON

PAY STATUS

ACTION

1

Monika Sharma

Internal

SALEC-10363

food

6500

5000

Sep 6, 2024

Unpaid

👁

1

Monika Sharma

Internal

SALEC-10362

Food

3500

2800

Aug 16, 2024

Unpaid

👁

1

Monika Sharma

Internal

SALEC-10361

Two wheeler

6500

6500

Aug 16, 2024

Unpaid

👁

1

Monika Sharma

Internal

SALEC-10360

FOod

50000

50000

Aug 13, 2024

Unpaid

👁

Admin can mark the employee status as Paid by > Click on Pay

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Other Earnings

Expense

Entity

All Entities

Department

All Department

Designation

All Designation

Location

All Location

Employee Status

All Employees

Employee Branch

All Employee Branch

Pay Status

All

Request Raised From Date

01-Aug-2024

Request Raised To Date

15-Oct-2024

Search Employee Codes (Separated by Commas ',')

Bank Sheet

Search

Search Employee

Pay

	EMPLOYEE CODE	EMPLOYEE NAME	EMPLOYEE TYPE	EXPENSE NUMBER	EXPENSE TITLE	REQUESTED AMOUNT	APPROVED AMOUNT	REQUEST RAISED ON	PAY STATUS	ACTION
<input checked="" type="checkbox"/>	1	Monika Sharma	Internal	SALEC-10363	food	6500	5000	Sep 6, 2024	Unpaid	
<input type="checkbox"/>	1	Monika Sharma	Internal	SALEC-10362	Food	3500	2800	Aug 16, 2024	Unpaid	
<input type="checkbox"/>	1	Monika Sharma	Internal	SALEC-10361	Two wheeler	6500	6500	Aug 16, 2024	Unpaid	
<input type="checkbox"/>	1	Monika Sharma	Internal	SALEC-10360	Food	50000	50000	Aug 13, 2024	Unpaid	

Eye icon: View full expense details.

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Entity

All Entities

Department

All Department

Designation

All Designation

Location

All Location

Employee Status

All Employees

Employee Branch

All Employee Branch

Pay Status

All

Request Raised From Date

01-Aug-2024

Request Raised To Date

15-Oct-2024

Search Employee Codes (Separated by Commas ',')

Bank Sheet

Search

Search Employee

Pay

	EMPLOYEE CODE	EMPLOYEE NAME	EMPLOYEE TYPE	EXPENSE NUMBER	EXPENSE TITLE	REQUESTED AMOUNT	APPROVED AMOUNT	REQUEST RAISED ON	PAY STATUS	ACTION
<input checked="" type="checkbox"/>	1	Monika Sharma	Internal	SALEC-10363	food	6500	5000	Sep 6, 2024	Unpaid	
<input type="checkbox"/>	1	Monika Sharma	Internal	SALEC-10362	Food	3500	2800	Aug 16, 2024	Unpaid	
<input type="checkbox"/>	1	Monika Sharma	Internal	SALEC-10361	Two wheeler	6500	6500	Aug 16, 2024	Unpaid	
<input type="checkbox"/>	1	Monika Sharma	Internal	SALEC-10360	Food	50000	50000	Aug 13, 2024	Unpaid	

Expense Details (SALEC-10363)

EXPENSE TYPE	BILL NO.	DATE FROM	DATE TO	REQUESTED AMOUNT	APPROVED AMOUNT
Food		Sep 4, 2024	Sep 6, 2024	6500	5000

Bank Sheet: Download filtered list in XLV format.

Bank Sheet

Below are the details in the downloaded Bank Sheet.

S. No.	Employee Name	Employee Code	Amount	Bank Name	Account Number	Ifsc Code	Permanent Address
--------	---------------	---------------	--------	-----------	----------------	-----------	-------------------

Note. While searching for the details, select the date range of three months. The below error will pop if the admin doesn't filter with a date range of three months

Please select date between three months.

Tax Declaration

- View and manage declarations raised by employees.
- Use filters and take actions: **Approve, Reject, Reconsider.**
- **Email Notification:** Trigger email for declaration reminders.
- **Freeze Investment Declarations:** Locks submitted declarations.
- Bulk **Approve & Reject** /declarations by selecting the request of the employees.

Edit the request by clicking on the **Eye Icon**.

The screenshot shows the 'Tax Declaration' interface. At the top, there are tabs for Loans, Advance, Reimbursement, Expense, **Tax Declaration**, Restructure, and Other Earnings. Below the tabs are filters for Entity, Department, Designation, Location, Branch, Employee Status, Fin Year, and Status. A search bar for employee codes is also present. On the left sidebar, the 'Benefits & Taxation' icon is highlighted. The main table lists requests for 'Monika Sharma' with columns for Employee, Section Name, Deduction Head, Requested Declaration, Accepted Declaration, Proof, Remarks, Status, and Action. A modal is open for editing a request, showing fields for Amount (15000), Remark, and a checkbox for 'Send Notification'. A red arrow points from the 'Eye' icon in the table to the modal.



Email Notification: Trigger email for declaration reminders by **clicking on Email Notification.**



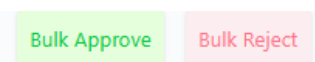
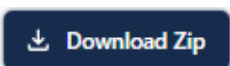
Freeze and Unfreeze Investment Declarations: Locks submitted declarations. **Click on Freeze Investment Declaration.**



Configure

- Enable/disable head structures visible in ESS.
- Show/hide head names, sections, and limits

Download the details in the Zip file by clicking on **Download Zip.**



- Bulk **Approve & Reject** /declarations by selecting the request of the employees.

This screenshot shows the 'Tax Declaration' interface with the top navigation bar and the table of requests. The top bar includes tabs for Loans, Advance, Reimbursement, Expense, **Tax Declaration**, Restructure, and Other Earnings. Below the tabs are buttons for Email Notification, Freeze Investment Declarations, and Configuration. The table lists requests for 'Monika Sharma' with columns for Employee, Section Name, Deduction Head, Requested Declaration, Accepted Declaration, Proof, Remarks, Status, and Action. The 'Status' column shows 'Pending' and 'Rejected'.

Freeze and Unfreeze Investment Declarations: Locks submitted declarations. Click on Freeze Investment Declaration

Investment Declaration Freeze

Freeze

Unfreeze

Entity

All Entities

Department

All Department

Designation

All Designation

Location

All Location

Employee Status

Active Employee

Employee Branch

All Employee Branch

<input type="checkbox"/>	EMPLOYEE CODE	EMPLOYEE NAME	STATUS
<input type="checkbox"/>	31	aarhsa	Unfrozen
<input checked="" type="checkbox"/>	15	Aarthi	Unfrozen
<input type="checkbox"/>	20	Abhishek Kumar	Unfrozen
<input type="checkbox"/>	10003	Aishwarya Gore	Unfrozen
<input type="checkbox"/>	Z8	Aishwarya Paradkar	Unfrozen
<input type="checkbox"/>	12	Ajay	Unfrozen
<input type="checkbox"/>	28	Akshata Bhatnagar	Unfrozen
<input type="checkbox"/>	42	Akshay Malhotra	Unfrozen
<input type="checkbox"/>	MN001	Alpesh Agrawal	Unfrozen
<input type="checkbox"/>	54	Amarkumar	Unfrozen
<input type="checkbox"/>	19	Ananya	Unfrozen

Configuration

Configure:

- Enable/disable head structures visible in ESS.
- Show/hide head names, sections, and limits.

Configuration				
<input type="checkbox"/>	HEAD NAME	HEAD SECTION	HEAD LIMIT	HEAD STATUS
<input type="checkbox"/>	Public Provident Fund	80C	150000	Visible
<input type="checkbox"/>	Mutual Fund	80C	150000	Visible
<input type="checkbox"/>	Deposit in National Saving Certificate/Scheme (NSC/NSS)	80C	150000	Visible
<input type="checkbox"/>	Repayment of Housing loan(Principal amount)	80C	150000	Visible
<input type="checkbox"/>	Unit Linked Insurance Premium (ULIP)	80C	150000	Visible
<input type="checkbox"/>	Life Insurance Premium	80C	150000	Visible
<input type="checkbox"/>	Children Tuition Fees	80C	150000	Visible
<input type="checkbox"/>	Fixed deposit in scheduled bank/post office under saving schemes	80C	150000	Visible
<input type="checkbox"/>	NABARD Notified/Rural Bonds	80C	150000	Visible
<input type="checkbox"/>	Other various items in 80C	80C	150000	Visible
<input type="checkbox"/>	Mutual Fund Pension	80CC	150000	Visible
<input type="checkbox"/>	Arrears / previous PF	80C	150000	Visible
<input type="checkbox"/>	Sukanya Samriddhi Yojana	80C	150000	Visible
<input type="checkbox"/>	Equity Linked Savings Scheme (ELSS)	80C	150000	Visible
<input type="checkbox"/>	VPF	80C	150000	Visible
<input type="checkbox"/>	Senior Citizen Saving Scheme	80C	150000	Visible
<input type="checkbox"/>	PF	80C	150000	Visible
<input type="checkbox"/>	Kisan Vikas Patra (KVP)	80C	150000	Visible
<input type="checkbox"/>	Long term Infrastructure Bonds	80C	150000	Visible
<input type="checkbox"/>	Pradhan Mantri Suraksha Bima Yojana	80C	150000	Visible

Restructure

- Tax-saving flexi-benefit available to C-level or high-tax employees.
- Use filters to view and manage restructure requests.

The screenshot shows the 'Restructure' module interface. At the top, a navigation bar includes 'Loans', 'Advance', 'Reimbursement', 'Expense', 'Tax Declaration', 'Restructure' (highlighted with a red box), and 'Other Earnings'. On the left, a sidebar contains icons for 'Home', 'Run Payroll', 'Employees', 'Arrear', 'Full & Final', 'Benefits & Taxation' (highlighted with a red box), 'Imports', 'Reports', 'Payout', and 'Configurations'. The main area is titled 'Restructure' and features search filters for 'Employee Branch', 'Employee Status' (set to 'Active Employee'), and 'Status'. A search bar for 'Employee Codes' is also present. Below the filters, a table lists employees with columns for 'EMPLOYEE', 'OTHER AMOUNT', and 'HEAD DETAILS'. Two employees are shown: 'admin account' and 'Detemot'. Each employee's details are expanded to show a list of benefits and their amounts. For 'admin account', benefits include Driver Salary (0), Mobile Allowance (0), vehicle allowance (22), NPS (0), vehicle allowance (400), NPS (0), Driver Salary (0), vehicle allowance (30), NPS (0), and LTA (1500). For 'Detemot', benefits include LTA (400), Driver Salary (100), Mobile Allowance (200), Travell Allowance (300), LTA (400), and LTA (500). The status of each employee's restructure request is indicated as 'Mapped'.

Other Sources of Earnings

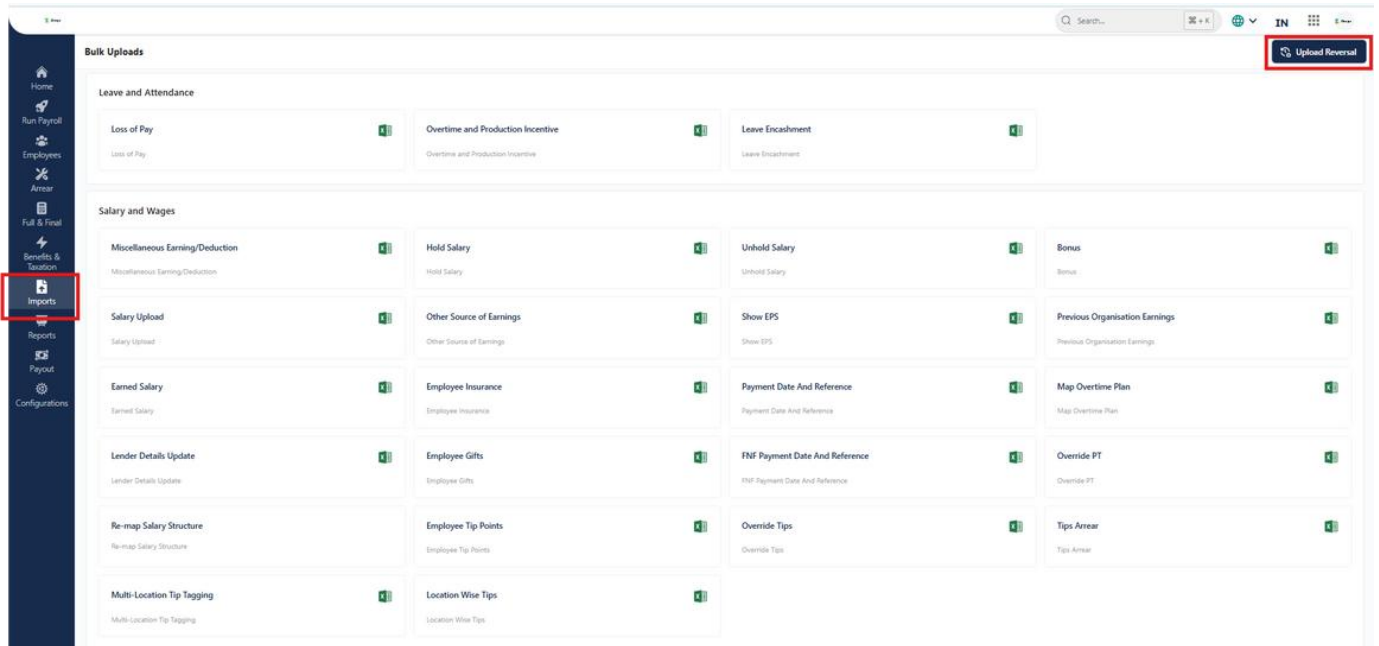
- View, Approve, Reject, and manage income declarations from non-salary sources.
- Select income type, enter amount, and upload proof.
- Use filters (Department, Designation, Entity, Branch).
- Click **Search** to view submitted requests.

The screenshot shows the 'Other Source of Earnings' module interface. At the top, a navigation bar includes 'Loans', 'Advance', 'Reimbursement', 'Expense', 'Tax Declaration', 'Restructure', and 'Other Earnings' (highlighted with a red box). On the left, a sidebar contains icons for 'Home', 'Run Payroll', 'Employees', 'Arrear', 'Full & Final', 'Benefits & Taxation' (highlighted with a red box), 'Imports', 'Reports', 'Payout', and 'Configurations'. The main area is titled 'Other Source of Earnings' and features search filters for 'Entity' (set to 'All Entities'), 'Financial year' (set to '2023'), 'Department', 'Designation', 'Employee Branch', 'Employee Status', 'Approval Status', and 'Search Employee Codes'. A search bar for 'Search Employee by Na' is also present. Below the filters, a table lists employees with columns for 'EMPLOYEE', 'DECLARED AMOUNT', 'APPROVED AMOUNT', 'PROOF', and 'STATUS'. Four employees are shown: 'Max', 'admin account', 'Normal payroll', and 'Hold salary'. Each employee's details are expanded to show their declared and approved amounts, the proof status, and the approval status. For 'Max', the declared amount is 600 and the approved amount is 600, with the status 'Approved'. For 'admin account', the declared amount is 220 and the approved amount is 220, with the status 'Approved'. For 'Normal payroll', the declared amount is 80 and the approved amount is 0, with the status 'Pending'. For 'Hold salary', the declared amount is 60000 and the approved amount is 60000, with the status 'Approved'. The 'Approve' and 'Reject' buttons are highlighted with a red box.

7. Imports

Description: Bulk upload employee payroll data.

- Leave and Attendance
- Salary and Wages
- Arrear
- Taxation
- Loan and Advance, Etc.

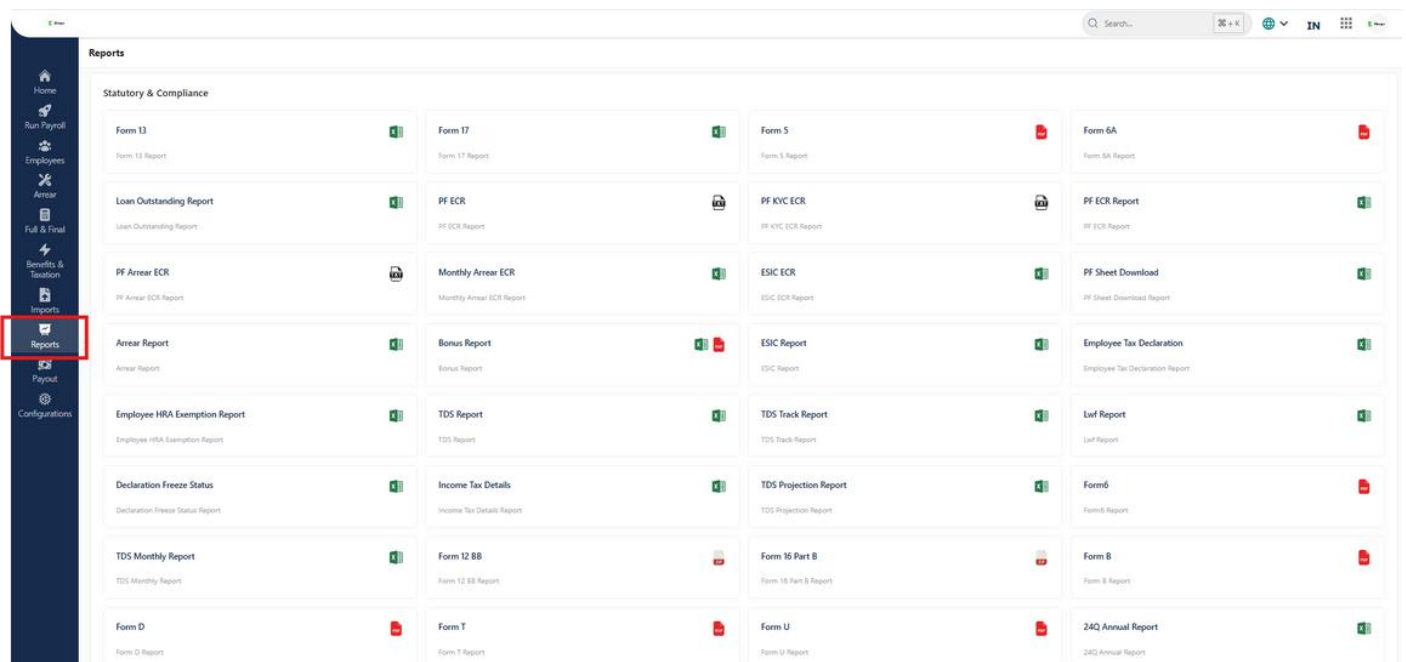


8. Reports

Description: Generate payroll-related reports. ^{SEP}

Features: View and download any report by selecting the particular report

- Salary & Wages Reports
- Statutory & Compliance
- Accounting & Finance
- Leave & Attendance











9. Configuration

Description: Core setup for payroll processing.

- Company Information
- Settings
- Salary Setup
- Compliance
- Email Library
- Report Configuration
- Integrations

The next sections will cover these menus in detail, starting with Run Payroll.

Company Information: This section shows a list of entities along with their relevance to employees within each entity. **The admin can edit & View company details by clicking the pencil icon and view more information by clicking the eye icon.**

ENTITY NAME	ENTITY LEGAL NAME	APPLICABILITY	ACTIONS
Sales XII	Zimyo HR Tech Pvt. Ltd.	Applicable to 93 Employees	 
Zimyo HRMS Software Pvt. Ltd.	Zimyo HRMS Software Pvt. Ltd.	Applicable to 11 Employees	 
Test Company	Test Company, India Pvt. Ltd.	Applicable to 4 Employees	 
Corporate Health Solutions	Corporate Health Solutions	Applicable to 0 Employees	 

Edit Button

The Edit button enables the admin to update registration details, bank information, addresses, and more. After making the necessary updates, the admin can save them by clicking the **“Save”** button.

1 Registration Info

ENTITY LEGAL NAME *	Date of Incorporation *	Mobile No *
Zimyo HR Tech Pvt. Ltd.	dd-mm-yyyy	9811223344
Email ID *	PAN No *	Company Identification No
Enter Email ID	BDDPP8506P	Enter No
Authorized Signatory *	Acknowledgment No	TAN No
Monika Sharma (1)	Enter No	Enter No
PTEC No	PTRC No	Responsible Person for paying salary/Deduction
Enter No	Enter No	
Std Code	Telephone Number	Deduction Type
Enter std code	Enter Telephone Number	

2 Address

Address *	Address Line 2 *	State *
Enter Full Address	Address Line 2	Delhi
City *	Pincode *	
Select City	Enter Pincode No	

3 Bank Details

Bank Name	Account Number	Branch
Enter Bank Name	Enter Account No	Enter Branch Name
City	Pincode	

Cancel Save