

Paybooks New Dashboard

Contents

1. Purpose	2
2. Prerequisites	2
3. Attendance	3
4. Apply Leave and Expense.....	4
5. My Summary.....	5
6. Tax planning.....	6
7. Team's Upcoming Leaves	7
8. Menu.....	7

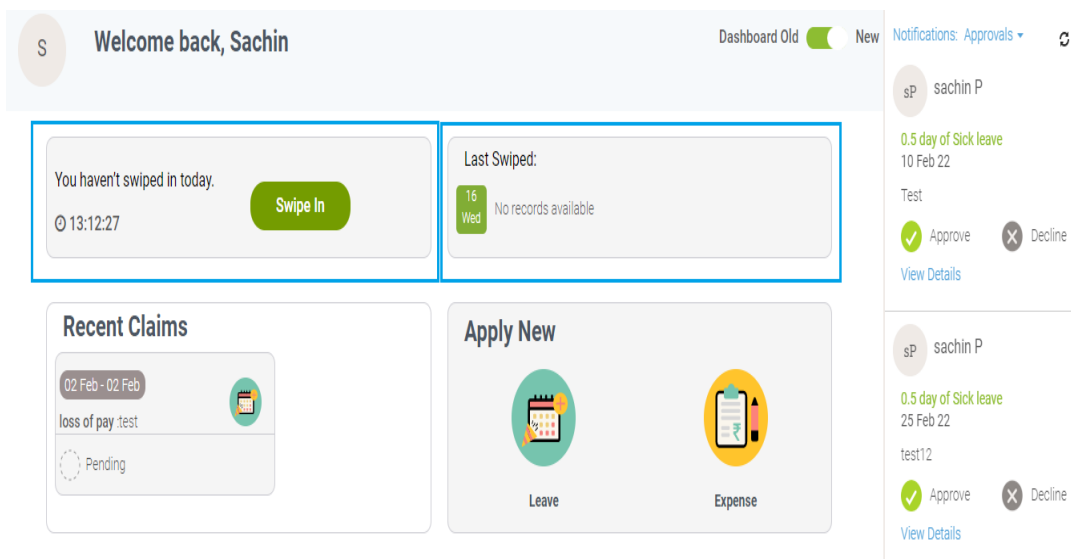
1. **Purpose:** New dashboard has been introduced to make Paybooks ESS end more appealing and user-friendly.

2. **Prerequisites:** User login must be created, and employees should have employee login details.

3. **Attendance:**

- An employee can swipe IN/OUT from the paybooks application (PAYTIME needs to be enabled) by clicking on the “Swipe IN” button, by clicking on the same button again it will be swiped OUT.


The last swipe gives info about the employee’s last swipe.



The screenshot displays the Paybooks ESS dashboard for user Sachin P. The main content area includes a 'Welcome back, Sachin' header, a 'Dashboard Old' toggle, and a 'New' section. The 'New' section contains a 'Swipe In' button and a 'Last Swiped' box showing '16 Wed' with 'No records available'. Below this are 'Recent Claims' (showing a pending 'loss of pay' test) and 'Apply New' options for 'Leave' and 'Expense'. The right sidebar shows notifications for '0.5 day of Sick leave' on 10 Feb 22 and 25 Feb 22, with 'Approve' and 'Decline' buttons.


- To check all swipes made by the employee, click on “My Swipes”. Here application shows all the swipes made by an employee for that month. By clicking on the arrow mark application will redirect to the attendance summary page which shows the reconciled attendance data.

My Summary




Payslips

January 22 payslip




Attendance

My Swipes



My Leaves

0 Remaining 0 Pending



My Expenses

0.00 Approved 0.00 Pending

Test

✓ Approve

✗ Decline

View Details

sP sachin P

0.5 day of Sick leave

25 Feb 22

test12

✓ Approve

✗ Decline

View Details

sP sachin P

0.5 day of Sick leave

4. Apply for Leave - Expense:

- Employees can apply for leave and expense by clicking on the “Leave”, “Expense” respectively in ‘Apply New’.
- Recent 30 request (15 from leave, 15 from expense) status can be viewed in “Recent Claims”

Recent Claims

Nov 25, 2021

Expense :1,500.00


✓ Approved

Nov 25, 2021

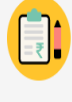
Expense :6,000.00

✓ Approved

Apply New




Leave




Expense

My Summary



Payslips

January 22 payslip



Attendance

My Swipes

VK Vijay Kumar

1 day of Earned Leave

10 Mar 22

test1

✓ Approved

View Details

VK Vijay Kumar

1 day of Sick leave

30 Mar 22

test11

✗ Rejected

View Details

VK Vijay Kumar


5. My Summary:

- **Payslip:** The application gives the option to view the employee payslip. In the new dashboard employee can view the payslip in ‘My Summary’. By clicking on the arrow application will redirect to the payslip history page where all month payslips are available. In the payslip card, it shows a quick view for the recent payslip generated

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by clicking on the month (example: January 22 payslip) application will open the payslip of that month.

My Summary




Payslips

January 22 payslip




Attendance

My Swipes



My Leaves

99 Remaining 0 Pending



My Expenses

8,071.00 Approved 3,000.00 Pending

VK Vijay Kumar

1 day of Earned Leave
10 Mar 22

test1

Approved

[View Details](#)

VK Vijay Kumar

1 day of Sick leave
30 Mar 22


test11

Rejected

[View Details](#)


- **My Leaves & My Expenses:** Employees can view Leave & Expense history by clicking on the arrow mark. In leave, below it gives details like no. of leaves remaining and no. of leave requested. The expense card gives details of the total amount approved in that fin year and the total amount pending.

My Summary




Payslips

January 22 payslip




Attendance

My Swipes



My Leaves

99 Remaining 0 Pending



My Expenses

8,071.00 Approved 3,000.00 Pending

VK Vijay Kumar

1 day of Earned Leave
10 Mar 22

test1

Approved

[View Details](#)

VK Vijay Kumar

1 day of Sick leave
30 Mar 22

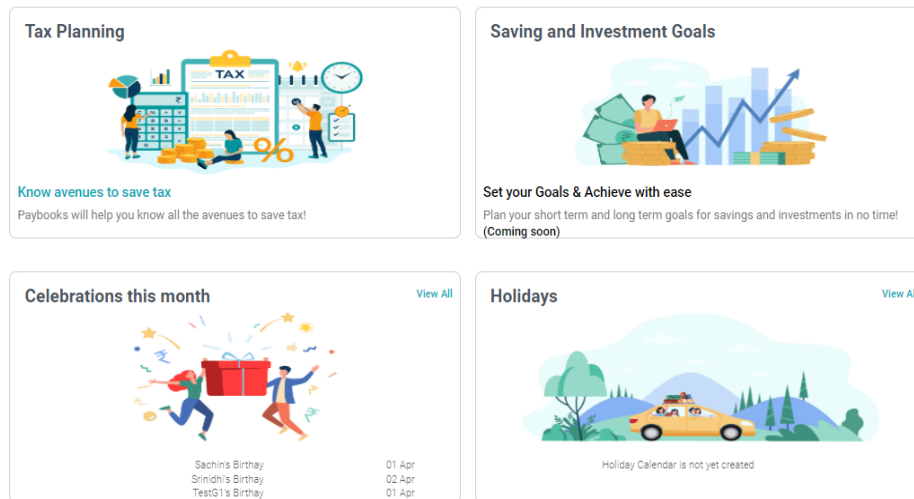
test11

Rejected

[View Details](#)

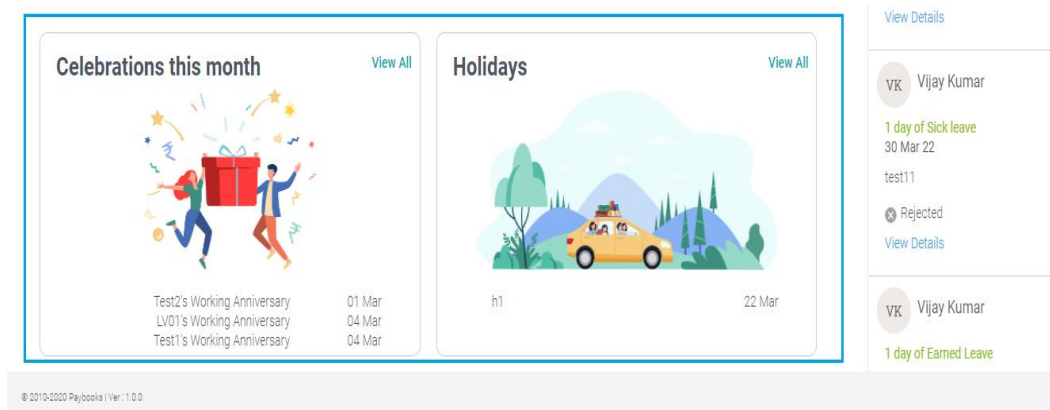
6. Tax Planning:

- Paybooks give provision to plan the taxes. To plan the taxes, scroll a little down and click on “Tax Planning”. Clicking on that will redirect to a page where the user can declare the taxes, view form 12BB, etc.



7. Celebrations & Holidays:

- To the bottom of the application, the employee can see the celebration (Birthday & Work anniversary) happening in the current month and Holidays that occur in the current Leave year.



8. Team's Upcoming Leaves:

- Manager login will have one extra feature "Team's Upcoming Leave", this helps manager track the subordinates' planned leaves. There is a toggle button to filter only approved and all leave requests.

Team's Upcoming Leaves

			Approved <input checked="" type="checkbox"/> All
V	vijay kumar	29 Mar - 31 Mar	sick leave <input type="checkbox"/>
V	vijay kumar	28 Mar - 28 Mar	earned leave <input checked="" type="checkbox"/>

₹450 for 1 Sub-Claim
Mar 16, 2022

Expense Report

☒ Approve ☒ Decline

[View Details](#)

VK Vijay Kumar

3 day of Sick leave
29 Mar 22 To 31 Mar 22


Brother's Marriage

☒ Approve ☒ Decline

[View Details](#)


VK Vijay Kumar

My Summary



Payslips

January 22 payslip



Attendance

My Swipes

9. Menu:

- The HCM module which was on the dashboard before is now added in the menu. And Leave and Expense history in the menu are removed.

- dashboard
- profile
- payslips
- approvals
- FBP
- my team
- shift
- reports
- more
- HCM**
- logout

back, Deepika

Dashboard Old ☒

I in today.

Swipe In

Last Swiped:

10 Wed No records available

ms

05 Aug - 05 Aug

loss of pay test

Pending

Apply New

Leave

Expense

Payslips

Attendance