

Leave Manager — SOP

How this module works

Tracks team leave requests end-to-end — apply, approve or reject — and automatically keeps Attendance, Calendar, and Salary in sync, with per-member balance tracking against configurable quotas.

SECTIONS

● KPI Dashboard Pending approvals, approved-this-month, who is on leave today, and total days taken — all update live via real-time sync, no page refresh needed.	● Apply Leave 6 leave types (Sick, Casual, Annual, Emergency, Maternity, Unpaid), half-day support, auto-calculated working days, and an optional document attachment.
● Leave Balance Per-member Annual/Sick/Casual quota tracking — used, remaining, and % consumed — refreshed automatically after every approval or policy change.	● Leave Policy Owner-configurable quotas, notice period, weekend-counting, and unpaid-leave rules. Changes refresh every balance card instantly, no reload.
● Document Attachment Optional PDF/JPG/PNG upload (max 5MB) on a leave request — shown as a downloadable link once submitted. New this month.	● AI Leave Insights On-demand AI analysis of leave patterns — flags frequent or excessive leave-takers and capacity risk. Generated only when opened, no background cost.

STEP-BY-STEP WORKFLOW

- 1

Apply Leave — pick member, type, dates, optional half-day + document. Days auto-calculate from the weekend-counting policy.
- 2

Casual/Annual/Maternity require the policy's notice-period (Sick/Emergency exempt); insufficient notice blocks submission. Balance-warning still shows but never blocks.
- 3

Submitting checks for an identical pending request first, then creates the leave as Pending — no accidental double-submits.
- 4

Owner reviews from Pending Approval — Approve or Reject, with an optional rejection reason and a WhatsApp notify-prompt either way.
- 5

Approving auto-marks each leave day as leave or half-day in Attendance, and creates a linked Calendar event for the period.
- 6

Unpaid leave also deducts (base salary ÷ 26 × days) from that month's Salary as an extra deduction — applied once, skipped if already paid.
- 7

Approve/Reject re-processing is blocked once a decision is made — no undo/reversal exists yet.
- 8

Deleting a leave also cleans up its linked calendar-event and uploaded document — no orphaned records or files left behind.

CONNECTIONS

●  Team OS Reads active team members for the Apply-Leave dropdown and Balance grid; approving a leave writes directly into that member's Attendance records.	●  Calendar Every approved leave creates a linked event spanning the leave period, so the team calendar always reflects who's away and when.
●  WhatsApp Approve/Reject actions offer an optional one-click WhatsApp notification to the member, using their phone number from Team OS.	●  App Settings Leave quotas, notice period, weekend-counting, and unpaid-leave rules are stored as key-value App Settings, editable from the Leave Policy panel.