Salary Engine — SOP

How this module works

Payroll engine for the team — computes monthly salaries from base pay, bonuses, attendance-based deductions, and statutory PF/ESI/TDS, tracks salary advances, and logs every payment as a real Expense + Bank ledger entry automatically.

SECTIONS

- **Payroll Dashboard**
  4 KPI cards (Total Payroll / Paid / Pending / Advances) with a month-year period switcher.
- **Auto-Calculated Salary**
  Attendance deduction, PF, ESI, and TDS are computed automatically for every active team member, every month — no manual entry needed.
- **Advances**
  Give a team member a cash advance with an optional auto-deduct-per-month plan; track remaining balance and repayment status.
- **Payroll Settings**
  PF/ESI/TDS rates and toggles, working-days-per-month, and payroll-processing-day — all configurable, no hardcoded values.
- **Salary History**
  A 6-month payroll trend chart plus a full per-member breakdown for any past month.

STEP-BY-STEP WORKFLOW

1. Every active team member gets an auto-generated pending salary row the moment you open Salary Engine for any month — base pay pulled from their Team OS profile.
2. That month's attendance (from Team OS) is converted into an automatic deduction — capped at 50% of base pay, and never applied until at least 5 working days have passed in the month.
3. PF, ESI, and TDS are calculated automatically from Payroll Settings' rates (ESI only applies below ₹21,000 base pay).
4. All statutory deductions (PF/ESI/TDS) can be turned off via one master toggle in Payroll Settings — individual toggles/rates stay configured underneath, just inactive while master is off.
5. If the team member has an active advance with a monthly deduction plan, that amount is added to their deductions automatically.
6. Bonus and one-off Other Deductions can be edited per member any time — until that salary is marked Paid.
7. Marking a salary Paid locks it (bonus/deductions can't be edited after) and auto-creates a matching Expense entry plus a Bank debit transaction — no duplicate manual entry needed.
8. Once marked Paid, bonus/deductions can't be edited — but the net amount can still be corrected via the Correct action, which requires a reason and keeps Bank + Expense records in sync.
9. Download a payslip PDF or send a WhatsApp summary to the team member at any time.

CONNECTIONS

Team OS

Base salary, role, and avatar come directly from each member's Team OS profile; attendance marked there (present/half-day/leave) drives the automatic attendance-deduction.

Expenses

Marking a salary Paid automatically creates a real Expense entry (category: salary) — payroll shows up in expense reports with zero manual re-entry.

Bank

The same paid salary also creates a real Bank debit transaction against your primary bank account, keeping the bank ledger accurate.

App Settings

PF/ESI/TDS rates, working-days-per-month, and payroll-day are stored centrally and shared with this module's own Settings panel.
