

STOCK2TRACK

HR, Leave & Payroll

User manual and guide — staff records, leave and holidays, salary structures, the monthly payroll and payslips

START HERE

Before you begin

1. Open **Admin** > **Module Setup** and switch on **HR / Leave** and **Payroll**.
2. Add your staff, with a reporting manager and bank details (Chapters 1 and 2).
3. Set up leave types, allocate them, and enter the year's holidays (Chapter 3).
4. Set each person's salary structure (Chapter 6).

Each month

1. Approve leave as it comes in (Chapter 5).
2. Generate, check and approve the payroll (Chapter 7).
3. File PF and ESI, and pay salaries from the bank statement (Chapter 8).

Chapters

- | | |
|-----------------------------|--------------------------------|
| 1. Your Staff | 5. Approving Leave |
| 2. An Employee's Record | 6. Salary Structure |
| 3. Leave Types and Holidays | 7. Running the Monthly Payroll |
| 4. Applying for Leave | 8. Payroll Reports |

Your Staff

One list of staff. The same names are used as sales reps on bills, for leave and for payroll.

Who	Owner	How often	When someone joins
-----	-------	-----------	--------------------

Why it matters

Leave, payslips and sales commission all hang off this one record per person.

How to use it

1. Open **HR / Leave > Employees**. Under **Add New Representative**, type the **Name**, choose the shift **Type** and **Location**, and press **Add**.
2. Change a name, type or location straight in the table; it saves as you change it.
3. Press the pencil on a person to open their full record.

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QUICK INVOICE

NEW INVOICE

Representatives

1

Add New Representative

Name

Type

Tag One

Tag Two

Location

+ ADD

3

Actions	Name	Type	Tag One	Tag Two	Location
 	Anil Varma	Day full time			Main Store
 	Sunil Naik	Night full time			Main Store
 	Ramesh Yadav	Day full time			Main Store
 	Prakash Goud	Day full time			Godown
 	Lakshmi Bai	Day full time			Main Store
 	Suresh Babu	Day full time			Main Store
 	Arif Shaik	Day full time			Kukatpally Branch
 	Kiran Kumar	Day full time			Kukatpally Branch
 	Sneha Rao	Day full time			Main Store
 	Demo Admin	Day full time			Main Store
 	Meena C	Day full time			Main Store

Figure 1. The staff list

- 1

Add a person
- 2

Staff, edited in place
- 3

Open the full record, or delete

Before you start

Privilege **Sales Rep**. The **HR / Leave** module must be on in Admin > Module Setup.

Good to know

- Never delete someone who has left; untick **Active** on their record (Chapter 2). Their bills keep their name.

An Employee's Record

Personal details, department, reporting manager, bank account and statutory numbers, and the leave balance.

Who	Owner	How often	When details change
-----	-------	-----------	---------------------

Why it matters

The reporting manager decides who approves this person's leave, and the bank details go on the payroll bank statement.

How to use it

1. Fill in **Personal Information**: department, designation, date of joining, **Reporting Manager**, phone, email.
2. Fill in **Salary & Bank Details** (account number, bank, IFSC) and **Statutory Details** (PAN, Aadhaar, PF and ESI numbers).
3. The **Leave Balance** shows each leave type allocated, used and left this year.
4. Press **Save**. Untick **Active** when the person leaves.

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QUICK INVOICE

NEW INVOICE

BACK TO REPRESENTATIVES

Sneha Rao

1

Personal Information

Name

Sneha Rao

Department

Sales

Designation

Cashier

Date of Joining

06-Mar-2024

2

Reporting Manager

Demo Admin

X

Phone

9000200005

Email

sneha@example.com

Type

Day Full Time

Location

10024

Tag One

Tag Two

3

Salary & Bank Details

Salary

₹ 17,500.00

Bank Account No

00001234503

Bank Name

Demo Bank

IFSC Code

DEMO00000001

4

Statutory Details

PAN

ABCPDI003K

Aadhaar No

900011112203

PF No

TS/HYD/12345/103

ESI No

5200012345003

Leave Balance (2026)

Figure 2. An employee record

- 1

Name, department, designation, joining date
- 2

Who approves their leave
- 3

Bank account for salary
- 4

PAN, Aadhaar, PF and ESI numbers

Before you start

Privilege **Employee View**; saving needs **Employee Edit**.

Good to know

- The Salary box here is for reference. Payroll uses the salary structure (Chapter 6).

Leave Types and Holidays

The kinds of leave and how many days a year each gives, and the shop's holidays.

Who	Owner	How often	At the start of each year
-----	-------	-----------	---------------------------

Why it matters

Quotas set once a year mean staff can see their own balance, and nobody argues about how many days are left.

How to use it

1. Open **Admin > Leave Types**. Type the **Leave Type Name**, a **Short Code** (CL, SL, EL) and the **Days / Year**, and press **Add**.
2. Press **Allocate to All Employees** to give every active employee this year's quota of every leave type. Existing balances are kept. Do this every January and after someone joins.
3. Open **Admin > Holidays**, choose the **Year**, type each **Holiday Name** and **Date**, and press **Add**.

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QUICK INVOICE

NEW INVOICE

Leave Type Setup

Add New Leave Type

1

Leave Type Name

Short Code

Days / Year0

Carry Forward

Max Carry Forward0

Paid Leave

+ ADD

2

3

Leave Type	Code	Days / Year	Carry Forward	Max CF	Paid	Actions
Casual Leave	CL	12	☐	0	☒	edit delete
Comp Off	CO	0	☐	0	☒	edit delete
Earned Leave	EL	15	☒	30	☒	edit delete
Loss of Pay	LOP	0	☐	0	☐	edit delete
Sick Leave	SL	12	☐	0	☒	edit delete

Bulk Allocation

4

Allocate all leave types to every active employee for the current year. Existing allocations will not be overwritten.

ALLOCATE TO ALL EMPLOYEES

Figure 3. Leave types

- 1

Name, code and days a year
- 2

Your leave types
- 3

Code (LOP = unpaid)
- 4

Give this year's quota to everyone

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8

QUICK INVOICE

+ NEW INVOICE

Holiday Setup

1 Year

2026

2

Add New Holiday

Holiday Name

Date

Optional Holiday

+ ADD

3

Holidays for 2026

Holiday Name	Date	Day	Optional	Actions
Sankranti	14-Jan-2026	Wednesday	☐	
Republic Day	26-Jan-2026	Monday	☐	
Ugadi	19-Mar-2026	Thursday	☐	
Ramzan (Id-ul-Fitr)	21-Mar-2026	Saturday	☒	
Telangana Formation Day	02-Jun-2026	Tuesday	☐	
Bonalu	20-Jul-2026	Monday	☐	
Independence Day	15-Aug-2026	Saturday	☐	
Vinayaka Chavithi	14-Sep-2026	Monday	☐	

Figure 4. Holidays

- 1 Year
- 2 Add a holiday
- 3 The year's holidays

Before you start

Privileges **Leave Type Setup** and **Holiday Setup**.

Good to know

- Payroll treats leave as unpaid only when its code is exactly **LOP**. Give LOP a large Days / Year (for example 365) so it can always be applied for.
- Sundays are the weekly off; holidays and Sundays are not counted as leave days.

Applying for Leave

Staff see their own balance, apply for leave, and follow its status.

Who	Every employee	How often	When leave is needed
-----	----------------	-----------	----------------------

Why it matters

A written request with a reason, and an answer on screen. No more "I told you last week".

How to use it

1. Open **HR / Leave > Apply Leave**. **My Leave Balances** shows each type allocated, used and left.
2. Choose the **Leave Type**, the **From Date** and **To Date**. **Days** counts working days only.
3. Type the **Reason** and press **Submit Leave Request**. It shows as Pending in **My Leave History**.
4. A pending request can be cancelled from the history.

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QUICK INVOICE

NEW INVOICE

Apply for Leave

My Leave Balances (2026)

Leave Type	Allocated	Used	Balance
Casual Leave	12.0	0.0	12.0
Comp Off	0.0	0.0	0.0
Earned Leave	15.0	2.0	13.0
Loss of Pay	0.0	0.0	0.0
Sick Leave	12.0	2.0	10.0

New Leave Request

Leave Type

From Date

To Date

Days

Reason

SUBMIT LEAVE REQUEST

My Leave History

Leave Type	From	To	Days	Status	Reason	Actions
------------	------	----	------	--------	--------	---------

Figure 5. Applying for leave

- 1

Your balance
- 2

Type and dates
- 3

Working days counted
- 4

Send the request
- 5

Your past requests and their status

Before you start

Privilege **Leave Apply**. The login's first name must appear in the person's employee name.

Good to know

- Approved leave cannot be cancelled by the employee; ask the manager.

Approving Leave

Approve or refuse requests, and see who is away on a month calendar.

Who	Manager	How often	Daily
-----	---------	-----------	-------

Why it matters

Knowing who is off on Saturday before Saturday is how the counter stays staffed.

How to use it

1. Open **HR / Leave > Leave Approvals. Pending Approvals** lists the requests from your team.
2. Press **Approve**, or **Reject** and type the reason. Approved days are taken from the balance.
3. **History** shows past decisions. **Leave Calendar** shows a month with everyone's approved leave by code; press **Load** after choosing the month.
4. **Leave Report** gives every employee's balance for the year, and exports the leave history to Excel.

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QUICK INVOICE

NEW INVOICE

Leave Approvals

PENDING APPROVALS

HISTORY

Employee	Leave Type	From	To	Days	Reason	Applied On	Actions
Kiran Kumar	Earned Leave	28-10-2026	30-10-2026	3.0	Sister's wedding	15-10-2026	APPROVE REJECT
Prakash Goud	Sick Leave	21-10-2026	21-10-2026	1.0	Doctor appointment	15-10-2026	APPROVE REJECT
Ravi	Casual Leave	25-10-2026	26-10-2026	2.0	Travel to village	15-10-2026	APPROVE REJECT

Figure 6. Pending requests

- 1

Requests waiting for you
- 2

Who, what, when and why
- 3

Approve or reject

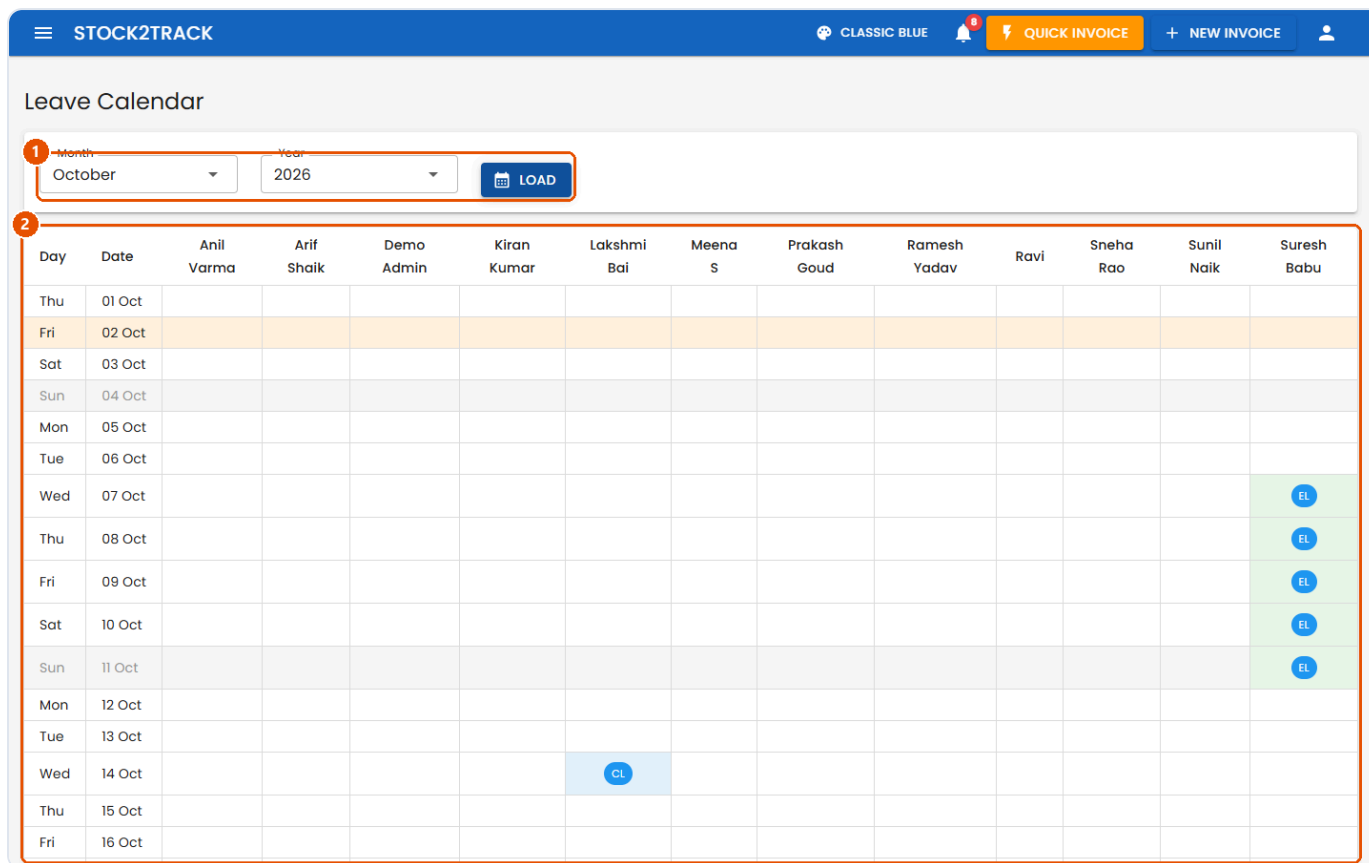


Figure 7. Leave calendar

- 1 Choose the month, then Load
- 2 Who is away each day, by leave code

Before you start

Privilege **Leave Approve**; calendar and report need **Leave Report**.

Good to know

- Managers see requests from staff whose Reporting Manager they are; the owner sees all.
- A decision cannot be undone.

Salary Structure

Each person's monthly earnings and the rates of PF, ESI, professional tax and TDS.

Who	Owner	How often	
	Owner	At joining and at each raise	

Why it matters

Payroll is worked out from this structure every month. Set it right once and every payslip follows.

How to use it

1. Open **Admin › Salary Setup** and choose the **Employee**.
2. Under **Earnings**, type Basic, HRA, DA, special, conveyance, medical and other allowances. The **Gross Salary** adds up.
3. Check the **Deduction Settings**: PF 12% employee and employer, ESI 0.75% and 3.25%, professional tax ₹200, TDS %.
4. **CTC Breakdown** adds the employer's PF and ESI to the gross. Set the **Effective From** date and press **Save**.

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Salary Setup – Sneha Rao

- Employee**
Sneha Rao
- Earnings**

Basic 8,750.00	HRA 3,500.00	DA 875.00	Special Allowance 1,525.00
Conveyance 1,600.00	Medical Allowance 1,250.00	Other Allowances 0.00	Gross Salary 17,500.00
- Deduction Settings**

PF Employee % 12.00	PF Employer % 12.00	ESI Employee % 0.75	ESI Employer % 3.25
Professional Tax (Fixed) 200.00	TDS % 0.00		
- CTC Breakdown (Monthly)**

Gross Salary 17,500.00	Employer PF 1,050.00	Employer ESI 568.75	CTC 19,118.75
---------------------------	-------------------------	------------------------	------------------

Effective From: 03-04-2026

SAVE **← BACK**

Figure 8. Salary structure

- | | |
|------------------------------|---|
| 1 Employee | 3 PF, ESI, professional tax and TDS rates |
| 2 Monthly earnings and gross | 4 Cost to the company |

Before you start

Privilege **Salary Setup**. The **Payroll** module must be on.

Good to know

- Saving creates a new structure; payroll always uses the latest one.
- ESI applies only when the gross is ₹21,000 or less. Employer PF is capped at ₹1,800.

Running the Monthly Payroll

Generate every payslip for the month, check them, and approve to lock the month.

Who

Owner, accountant

How often

Monthly

Why it matters

Every rupee is calculated the same way for everyone, from attendance and approved leave, and the month is locked once paid.

How to use it

1. Open **Payroll > Run Payroll**. Choose the **Month** and **Year** and press **Load**.
2. Press **Generate Payroll**. Each employee with a salary structure gets a payslip: working days, present days, loss-of-pay days, gross, PF, ESI, PT, TDS, LOP deduction and **Net Pay**.
3. Check the figures. Press the eye icon to open a payslip, and print it.
4. Press **Approve**. The month is locked and cannot be generated again.

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NEW INVOICE

Payroll Run

1 MonthSeptember

2 Year2026

LOAD

GENERATE PAYROLL

APPROVE

3

Payroll for September 2026 - Status: Generated | Run By: demo on 17-10-2026 00:40

Employee	4 Working Days	Present	LOP	Gross	PF	ESI	PT	TDS	LOP Ded	5 Net Pay	Actions
Anil Varma	25	25.00	0.00	16,000.00	960.00	120.00	200.00	0.00	0.00	14,720.00	👁️
Arif Shaik	25	25.00	0.00	19,000.00	1,140.00	142.50	200.00	0.00	0.00	17,517.50	👁️
Demo Admin	25	25.00	0.00	62,000.00	1,800.00	0.00	200.00	3,100.00	0.00	56,900.00	👁️
Kiran Kumar	25	25.00	0.00	32,000.00	1,800.00	0.00	200.00	0.00	0.00	30,000.00	👁️
Lakshmi Bai	25	25.00	0.00	21,000.00	1,260.00	157.50	200.00	0.00	0.00	19,382.50	👁️
Meena S	25	25.00	0.00	18,500.00	1,110.00	138.75	200.00	0.00	0.00	17,051.25	👁️
Prakash Goud	25	25.00	0.00	16,500.00	990.00	123.75	200.00	0.00	0.00	15,186.25	👁️
Ramesh Yadav	25	25.00	0.00	14,000.00	840.00	105.00	150.00	0.00	0.00	12,905.00	👁️
Ravi	25	25.00	0.00	24,000.00	1,440.00	0.00	200.00	0.00	0.00	22,360.00	👁️
Sneha Rao	25	22.00	3.00	17,500.00	924.00	115.50	200.00	0.00	2,100.00	14,160.50	👁️
Sunil Naik	25	25.00	0.00	14,000.00	840.00	105.00	150.00	0.00	0.00	12,905.00	👁️
Suresh Babu	25	25.00	0.00	22,000.00	1,320.00	0.00	200.00	0.00	0.00	20,480.00	👁️
TOTAL (12 employees)				2,76,500.00	14,424.00	1,008.00	2,300.00	3,100.00	2,100.00	2,53,568.00	

Figure 9. Payroll for the month

- 1

Month and year
- 2

Work out every payslip
- 3

Status: Generated or Approved
- 4

Working, present and loss-of-pay days
- 5

Take-home pay

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Pay Slip

1

Stock2Track Demo Store

Shop No. 12, Demo Market Road, Ameerpet, Hyderabad, Telangana

PAYSLIP FOR SEPTEMBER 2026

Employee Name

Anil Varma

Working Days

25

Department

Cafe

Present Days

25

Designation

Cafe

LOP Days

0

2

EARNINGS

Basic	8,000.00
HRA	3,200.00
DA	800.00
Special Allowance	1,150.00
Conveyance	1,600.00
Medical Allowance	1,250.00
Other Allowances	0.00
Total Earnings	16,000.00

3

DEDUCTIONS

Provident Fund (PF)	960.00
ESI	120.00
Professional Tax	200.00
TDS	0.00
LOP Deduction	0.00
Other Deductions	0.00
Total Deductions	1,280.00

Employer Contributions (not deducted from salary)

Employer PF

960.00

Employer ESI

520.00

4

NET PAY

Figure 10. A payslip

- 1 Month
- 2 Earnings
- 3 Deductions
- 4 Take-home pay, in figures and words

Before you start

Privilege **Payroll Run**; payslips need **Payroll View**.

Good to know

- Working days are the days of the month less Sundays and holidays. Only approved leave coded LOP reduces pay.
- Generating again replaces that month's payslips. Approve only when they are right.

Payroll Reports

The monthly summary, the PF and ESI registers, and the bank statement for salary transfers.

Who	Owner, accountant	How often	Monthly
-----	-------------------	-----------	---------

Why it matters

The PF and ESI registers are what you file; the bank statement is what you upload to the bank.

How to use it

1. Open **Payroll > Payroll Report**. Choose a tab, the **Month** and **Year**, and press **Generate**.
2. **Monthly Summary**: status, employees, gross, deductions and net, with each person's breakdown.
3. **PF Register** and **ESI Register**: employee and employer contributions. **Bank Statement**: account, IFSC and net pay for each person.
4. Press **Export Excel** for a copy.

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NEW INVOICE

Payroll Reports

MONTHLY SUMMARY

PF REGISTER

ESI REGISTER

BANK STATEMENT

Month

August

Year

2026

GENERATE

EXPORT EXCEL

Status

Approved

Employees

12

Total Gross

2,76,500.00

Total Deductions

20,973.75

Total Net

2,55,526.25

Employee	Basic	HRA	DA	Gross	PF	ESI	PT	TDS	LOP	Total Ded.	Net Pay
Anil Varma	8,000.00	3,200.00	800.00	16,000.00	960.00	120.00	200.00	0.00	0.00	1,280.00	14,720.00
Arif Shaik	9,500.00	3,800.00	950.00	19,000.00	1,140.00	142.50	200.00	0.00	0.00	1,482.50	17,517.50
Demo Admin	31,000.00	12,400.00	3,100.00	62,000.00	1,800.00	0.00	200.00	3,100.00	0.00	5,100.00	56,900.00
Kiran Kumar	16,000.00	6,400.00	1,600.00	32,000.00	1,800.00	0.00	200.00	0.00	0.00	2,000.00	30,000.00
Lakshmi Bai	10,500.00	4,200.00	1,050.00	21,000.00	1,260.00	157.50	200.00	0.00	0.00	1,617.50	19,382.50
Meena S	9,250.00	3,700.00	925.00	18,500.00	1,110.00	138.75	200.00	0.00	0.00	1,448.75	17,051.25
Prakash Goud	8,250.00	3,300.00	825.00	16,500.00	990.00	123.75	200.00	0.00	0.00	1,313.75	15,186.25
Ramesh Yadav	7,000.00	2,800.00	700.00	14,000.00	840.00	105.00	150.00	0.00	0.00	1,095.00	12,905.00
Ravi	12,000.00	4,800.00	1,200.00	24,000.00	1,440.00	0.00	200.00	0.00	0.00	1,640.00	22,360.00
Sneha Rao	8,750.00	3,500.00	875.00	17,500.00	1,050.00	131.25	200.00	0.00	0.00	1,381.25	16,118.75
Sunil Naik	7,000.00	2,800.00	700.00	14,000.00	840.00	105.00	150.00	0.00	0.00	1,095.00	12,905.00
Suresh Babu	11,000.00	4,400.00	1,100.00	22,000.00	1,320.00	0.00	200.00	0.00	0.00	1,520.00	20,480.00

Figure 11. Payroll reports

- 1

Summary, PF, ESI, bank statement
- 2

Status and totals
- 3

Each person's pay

Before you start

Good to know

- Check the Status tile: the report also shows months that are generated but not yet approved.

How pay is worked out

Figure	Calculation
Working days	Days in the month – Sundays – holidays
LOP days	Approved leave coded LOP starting in the month
LOP deduction	Gross ÷ working days × LOP days
PF (employee)	Basic for days present, up to ₹15,000, × PF %
ESI (employee)	Earned pay × ESI %, only if gross ≤ ₹21,000
Professional tax	The fixed amount, every month
TDS	Earned pay × TDS %
Net pay	Gross – PF – ESI – PT – TDS – LOP deduction

Permissions

Permission	What it allows
Employee View / Employee Edit	Staff records
Leave Apply	Applying for one's own leave
Leave Approve	Approving the team's leave
Leave Report	Calendar and leave report
Leave Type Setup / Holiday Setup	Leave types and holidays
Salary Setup	Salary structures
Payroll Run / Payroll View / Payroll Report	Running payroll, payslips, reports