ADVANCE REQUEST

INTRODUCTION:

This module of HR enables the user to create and manage employee advance policies. Employees can request for advance which are then reviewed and approved. During the payroll process the payroll module will take any outstanding loan or advance payments and consider those when calculating the individual's payout for the month.

- 1. Advance Request form
- 2. Approve Advance Request
- 3. Approve payment Request
- 4. View Advance Request
- 5. Advance Approval Repayment

PREREQUISITES:

- Create account in RNC (<u>http://relgo.com/</u>)
- Verify and create identity cast.
- Subscribe in ROC (<u>http://www.relgo.com/roc/</u>) with generated identity cast.

PROCESS FLOW:





1. ADVANCE REQUEST FORM:

In this employee can request for the advance salary.

Go to \rightarrow Hr \rightarrow Hr Management \rightarrow Payroll Management \rightarrow "Advance Request Form".

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Attendance Management	Advance Request Form // Advance Request Form		
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PayRoll Management	Name Of The Member	IT Administrator	
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View incentive Requests	*Advance Name :		
Approve Incentive	Advance Type :	Select an Option 👻	
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View Salary Statement			
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By clicking on "Advance Request Form" it will directed to new page,

This page contains the following details

"Advance no, Name of the Employee, Advance Type, Description, Required Date, Amount, Advance Settlement Date".

 \rightarrow By clicking on Add, A request sends to "User Account" from "Employee Account"

2. APPROVE ADVANCE REQUEST (RELGO ACCOUNTS)

In this accounts manager can login to the user account to approve the Advance Request

Go to \rightarrow Hr \rightarrow Hr Management \rightarrow Payroll Management \rightarrow "Employee Advance Repayment Plan"

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Set the duration period and click on show.

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Here we can view the generated form of Pending Payments, and account manager clicks on "Need to Approve"



After click on "Need to Approve" a popup window will raised to cross check the details, and it will have an option for approval/Disapproval, click on submit.

3. APPROVED PAYMENT REQUEST:

Now Accounts Manager will check in for payments. To check the approved requests

Go to→User→Relgo Accounts→payments→"Approved Payments Request"

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Home - HR - Administration -									
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Click on "Pay"

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After Clicking on pay, the above Payment voucher (two pop-up's will be raised) for the final payment. Here, account manager will validate the form to fill the required details.

Now Goto→User→RELGO Accounts→payments→"Approved Payments Request"

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After Clicking on approved request, the above screen will be displayed, here u can see the total paid amount.

4. VIEW ADVANCE REQUEST:

In this employee can view his advance request form status by login to his account.

Go to \rightarrow HR \rightarrow HR Management \rightarrow Payroll Management \rightarrow "View Advance Request Form"

HR Management		Request Form		vance Requ																	
Attendance Management																					
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View Monthly Salary Slip																					
Salary Statement																					

In this form employee can view his request status.

5. ADVANCE APPROVAL REPAYMENT:

This Action will be done by HR,

Go to→ HR→HR Management→Payroll Management→"Advance Approval Repayment"

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Click on Advance Approval Repayment.

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HR Management	Advance Approval Repayment > Advance Approval Repayment	
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After clicking on Advance Approval Repayment, the above screen will be displayed. Now, Set the duration period here and click on generate.

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After clicking on generate, the details will be generated as shown in above figure. Now, click on "Open" to view the "Advance Repayment Form".

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[X]		
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]	mahesh	Name Of the Employee
	salary Advance	*Advance Name :
	15000	Amount:
	10	No. of Deduction
	1500	Amount/Month
	02/20/2016	Start Date:
	15000	Balance Amount
	krishna chaithanya	Approved By
	InProgress 👻	Status
~	Add	Cancel

Here, After clicking on open, the above form will be open, now give the no. of deduction, amount per month, balance amount and mention the status of repayment process. Click on Add.

After advance payment request, go to generate salary slip.