

ADVANCE REQUEST

INTRODUCTION:

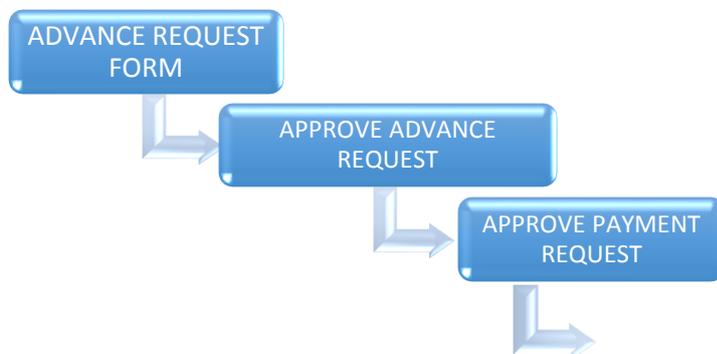
This module of HR enables the user to create and manage employee advance policies. Employees can request for advance which are then reviewed and approved. During the payroll process the payroll module will take any outstanding loan or advance payments and consider those when calculating the individual's 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 (<http://relgo.com/>)
- Verify and create identity cast.
- Subscribe in ROC (<http://www.relgo.com/roc/>) with generated identity cast.

PROCESS FLOW:





1. ADVANCE REQUEST FORM:

In this employee can request for the advance salary.

Go to → Hr → Hr Management → Payroll Management → "Advance Request Form".

The screenshot shows a web browser window with the URL `relgo.com/relgoerp/LeaveManagement.aspx?userid=itadministrator%40relgo.com&password=EJvEF0H0Ta6u...`. The page title is "Advance Request Form // Advance Request Form". The left sidebar contains a menu with items like "Attendance Management", "Organization Chart", "PayRoll Management", "Add Incentive Request", "View incentive Requests", "Approve Incentive", "Bank Statement", "Employee Advance Repayment Plan", "View Salary Statement", "Show Previous Salary Statement", "Self Payslip", "View Advance Requests", "Add Employee Salary Statement", "View Employee Salary Statement", and "Add Employee Salary Template". The main content area contains the following form fields:

- Advance no:
- Name Of The Member:
- *Advance Name:
- Advance Type:
- Description:
- Required Date: (with a calendar icon)
- Amount:
- Amount Received On: (with a calendar icon)

At the bottom of the form are two buttons: "Add" and "Cancel".

By clicking on "Advance Request Form" it will directed to new page,

This page contains the following details

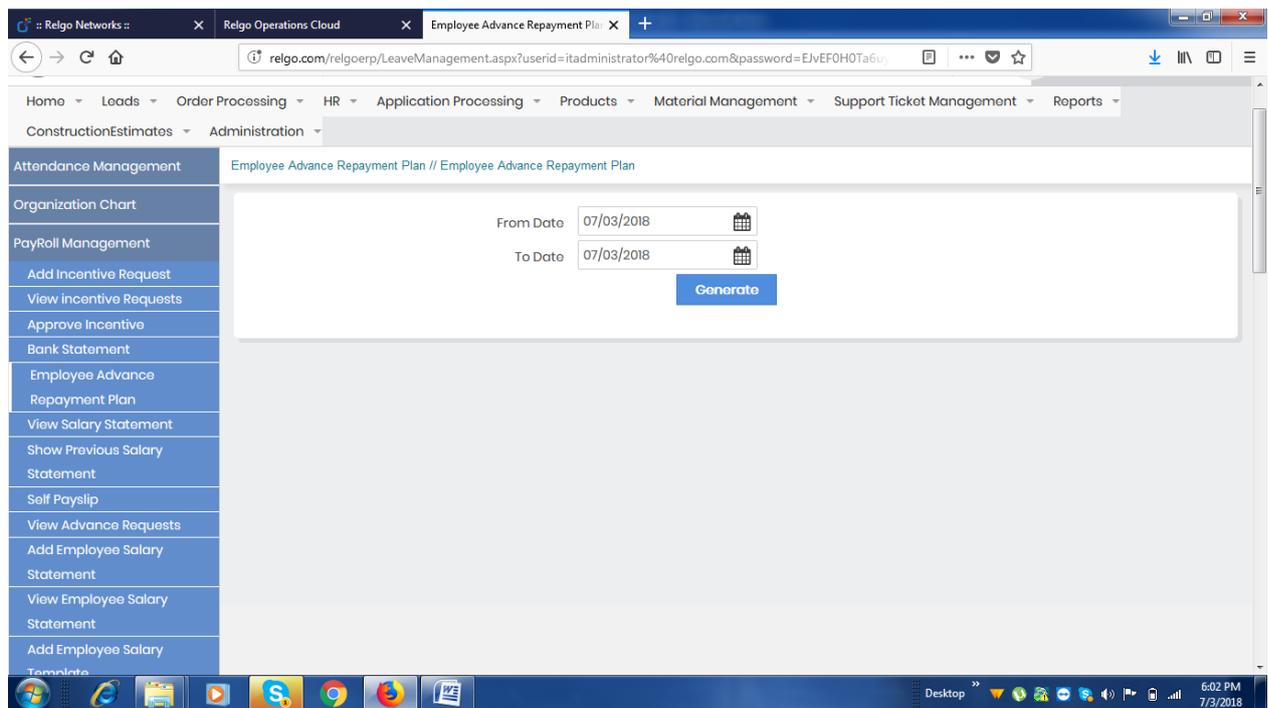
"Advance no, Name of the Employee, Advance Type, Description, Required Date, Amount, Advance Settlement Date".

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

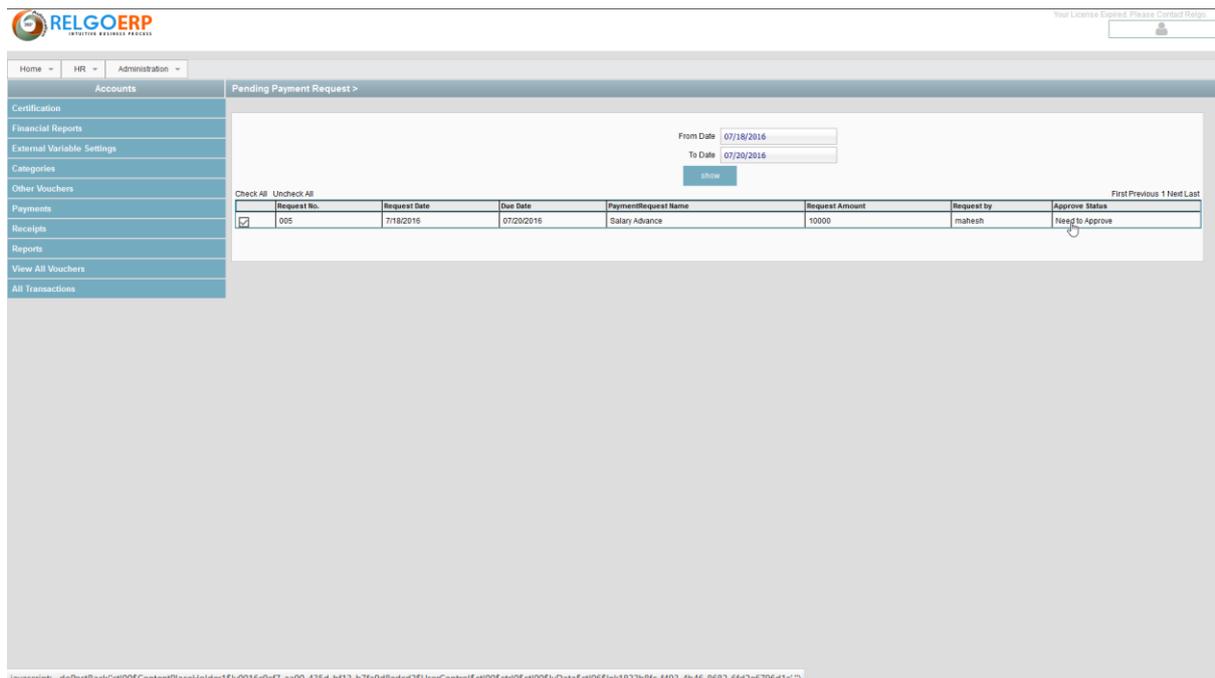
2. APPROVE ADVANCE REQUEST (RELGO ACCOUNTS)

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

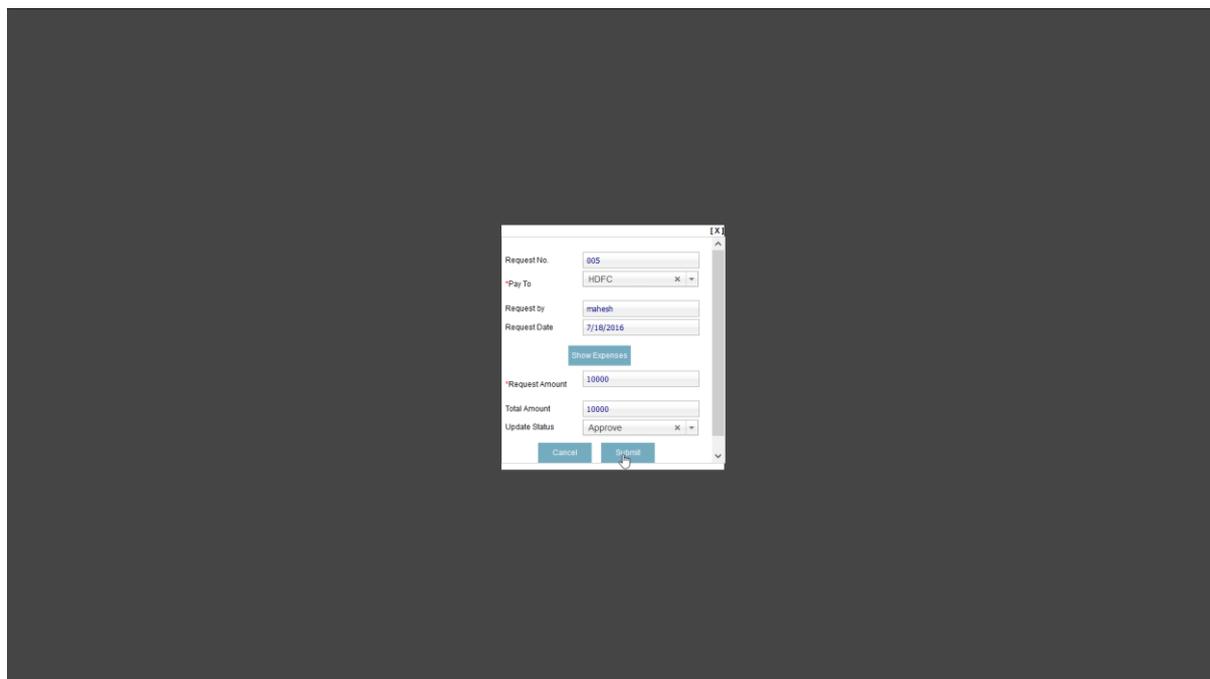
Go to → Hr → Hr Management → Payroll Management → “Employee Advance Repayment Plan”



Set the duration period and click on show.



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

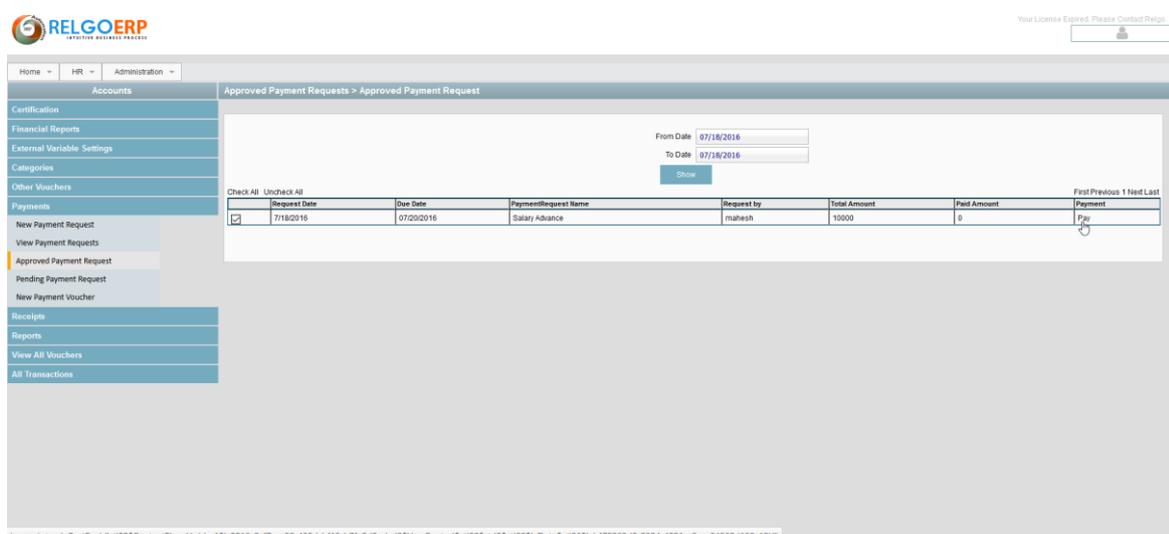


After click on “Need to Approve” a popup window will raised to cross check the details, and it will have an option for approval/Disapproval, click on submit.

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"



Click on “Pay”

The screenshot shows a payment request form with the following fields and values:

- PaymentRequest Name: Salary Advance
- *Accounts Category: Bank
- *Credit: HDFC
- Total Amount: 10000
- *Amount: 10000
- *Expense Name: Salary Advance
- *Debit: ICICI
- Balance Amount: 0
- Description: Response For the requested salary
- Other Details:
 - Budget Category: Select an Option
 - Select Expense Category: Select an Option
 - Sub Category: Select an Option
- Payment Details:
 - Mode Of Payment: Online Transaction
 - Transaction ID: (empty)
 - Transaction ID: (empty)

The screenshot shows a payment voucher form with the following fields and values:

- Budget Category: Select an Option
- Select Expense Category: Select an Option
- Sub Category: Select an Option
- Payment Details:
 - Mode Of Payment: Online Transaction
 - Transaction ID: (empty)
 - External Category: (empty)
- Reconcile: (empty)
- Buttons: Cancel, Pay (highlighted)

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"

The screenshot shows the RELGOERP HR Management interface. The top navigation bar includes 'Home', 'HR', and 'Administration'. The left sidebar lists various HR functions like 'Certification', 'Financial Reports', 'External Variable Settings', 'Categories', 'Other Vouchers', 'Payments', 'New Payment Request', 'View Payment Requests', 'Approved Payment Request', 'Pending Payment Request', 'New Payment Voucher', 'Receipts', 'Reports', 'View All Vouchers', and 'All Transactions'. The main content area is titled 'Approved Payment Requests >'. It features a search filter with 'From Date' and 'To Date' both set to '07/18/2016' and a 'Show' button. Below the filter is a table with the following data:

Request Date	Due Date	PaymentRequest Name	Request by	Total Amount	Paid Amount	Payment
7/18/2016	07/20/2016	Salary Advance	maresh	10000	10,000.00	Paid

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 → HR → HR Management → Payroll Management → "View Advance Request Form"

The screenshot shows the 'View Advance Request' form in the RELGOERP HR Management interface. The left sidebar lists various HR functions. The main content area is titled 'Advance Request Form > View Advance Request'. It features a search bar and a table with the following data:

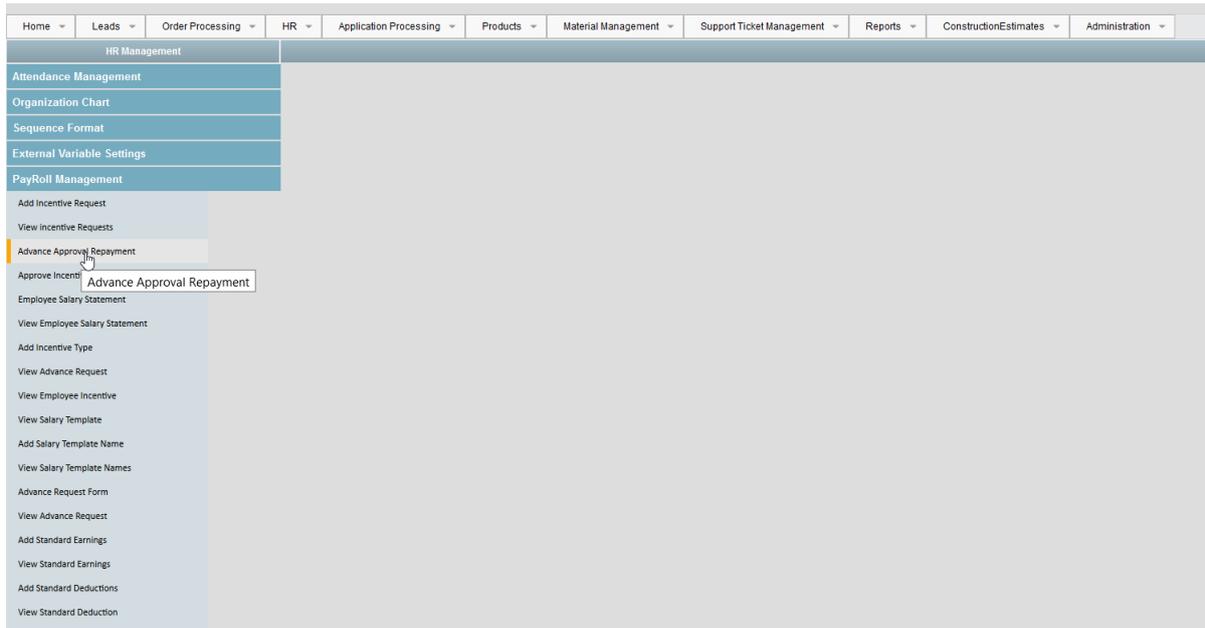
Advance no.	Name Of the Employee	Advance Name	Advance Type	Required Date	Amount	Advance Settlement Date	Approve Status	Paid Amount	Balance Amount	Deducted Amount	Payment	Approved By	Approved Amount	Amount Month	No. of Deduction	Start Date	Action	Hidden2	Edit	Delete
004	rajendar	Travel charge	Salary Advance	5/20/2016	12000	05/31/2016	Approve	12000	0	0	Pay	test advance	12000	1000	12	05/01/2016	Open			
005	maresh	Salary Advance	Salary Advance	7/18/2016	10000	07/20/2016	Approve	Reconcile	0	0	Pay	rajendar	10000			07/18/2016	Open	1c19b099-401c-4440-b4e8-83ee840c4845		
005	rajendar	salary advance	Salary Advance	5/20/2016	8000	05/28/2016	Approve	8000	0	0	Paid	test advance	8000	1000	8	06/01/2016	New	2af5d3c3-ea8b-4902-898b-63549090803e		
006	praveen	salary advance	Salary Advance	05/20/2016	20000	05/21/2016	Approve	10000	0	0	Paid	test advance	10000	2000	5	06/01/2016	New	311f8417-45f3-4251-bac9-c274f5f88fac		
007	praveen	salary advance	Salary Advance	5/20/2016	25000	05/21/2016	Approve	25000	0	0	Paid	test advance	25000	5000	5	06/01/2016	New	31654410-0e01-47ae-811e-3daa39ace655		
008	praveen	Salary Advance	Salary Advance	5/20/2016	2000	05/21/2016	Approve	2000	0	0	Paid	test advance	2000	1000	2	06/01/2016	New	f1fbdcea-4641-4e65-89eb-01b8384c5e99		
009	praveen	salary advance	Salary Advance	5/20/2016	6000	05/31/2016	Approve	2000	0	0	Paid	rajendar	6000	1000	2	06/01/2016	New	32f68c-96-4539-421c-8e42-c20002027296		
010	maresh	salary advance	Salary Advance	5/21/2016	3000	06/01/2016	Approve	3000	0	0	Paid	rajendar	3000	1500	2	04/01/2016	New	ce8d2027-a31a-4c52-9997-10a0dc6b951d		
010	maresh	Salary Advance	Salary Advance	5/20/2016	4500	05/31/2016		7000	0	0	Paid			3500	2	06/01/2016	New	ce8d2027-a31a-4c52-9997-10a0dc6b951d		
011	maresh	Travel charge	Travel Advance	5/21/2016	900	5/21/2016	Approve	011	0	0	Pay	rajendar	900			05/21/2016	Open	072707e-167d-47aa-8ab8-813eb4089e59		

In this form employee can view his request status.

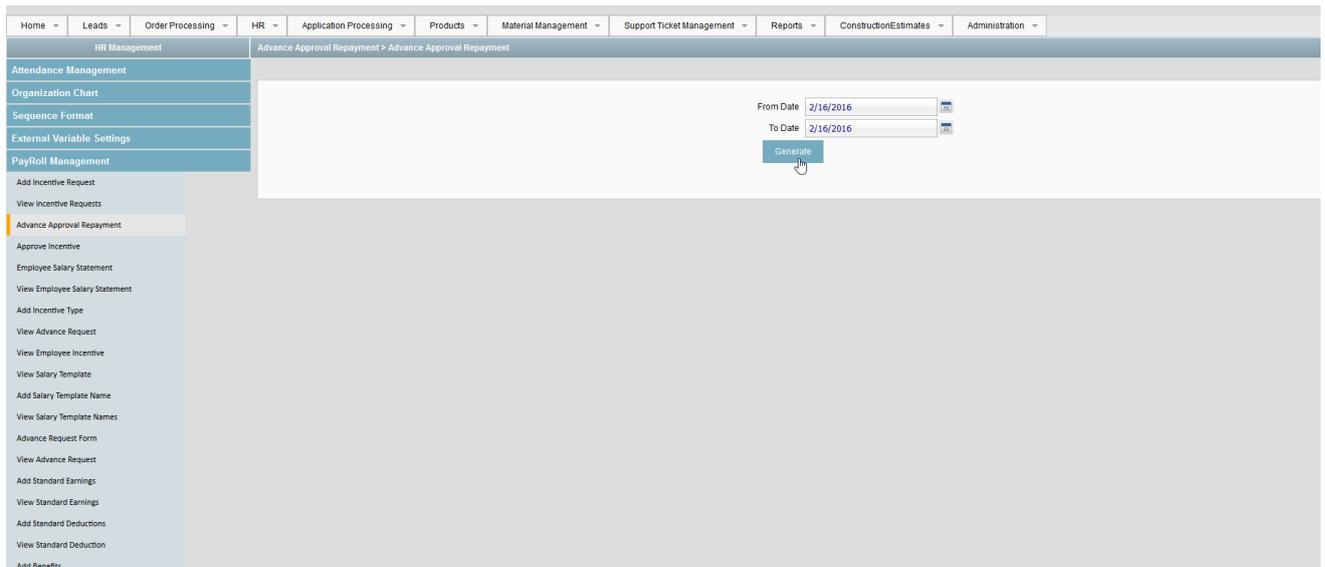
5. ADVANCE APPROVAL REPAYMENT:

This Action will be done by HR,

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



Click on Advance Approval Repayment.



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

Advance Approval Repayment >

From Date

To Date

Check All Uncheck All First Previous 1 Next Last

	Name Of the Employee	Advance Name :	HdfUsrAddress	Paid Amount	Deducted Amount	Approved By	Action:
<input type="checkbox"/>	maresh	salary Advance	maresh.jamula@relgo.com	15000	0	krishna chaithanya	Open

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

[X]

Advance no:

Name Of the Employee

*Advance Name :

Amount:

No. of Deduction

Amount/Month

Start Date:

Balance Amount

Approved By

Status

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.