

PRODUCT DOCUMENTATION

PayrollProCRM

Features & Capabilities Reference

Platform: ASP.NET Core 10 · SQL Server · ClosedXML

Architecture: Multi-company · Multi-location · Role-based SaaS

Target: Mid to large organisations

Document date: June 2026

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FEATURE MODULES

35+

CONTROLLERS

9

LIVE REPORTS

4

USER ROLES

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01 Authentication & Access Control

Feature	Description
Admin login	Email + password login for HR / admin roles
Employee portal login	Separate login path for employee self-service
Remember me	30-day persistent session (default: 8 hours)
Role-based claims	CompanyId, LocationIds, FullName baked into auth cookie
Four roles	SuperAdmin Admin Approver Employee
Company isolation	Non-SuperAdmin users see only their own company's data
Location-based filtering	Admins scoped to their assigned locations
Granular permissions	View / Add / Edit / Delete per module and master table

02 Employee Management

2.1 Employee Listing & Search

- Paginated employee list (15 per page) with status filters: Active, Inactive, Onboarded, Not Onboarded
- Full-text search by name, employee code, email, department

2.2 Employee Profile — Full CRUD

Tab-based multi-section form:

Tab	Fields
Personal	Name, date of birth, gender, blood group, marital status, nationality, phone, email, emergency contact
Employment	Department, designation, reporting manager, work location, shift type, employment status, joining date, probation, confirmation
Salary	Basic, HRA, conveyance allowance, medical allowance, special allowance, other allowances; EPF, ESI, PT, TDS deductions; gross salary, CTC
Compliance	PAN, Aadhaar (masked), passport, UAN, EPF number, ESI number; EPF / ESI / PT / Gratuity / TDS applicability flags
Bank	Bank name, account number, account type, IFSC code, branch, account holder name
Address	Current address (city, state, pin, country) and permanent address with "same as current" toggle
Documents	Upload and manage categorised employee documents

Profile Photo

- Upload JPG / PNG / WebP
- Stored under /uploads/profiles/

Document Management

- PDF, JPG, PNG, DOC, DOCX, XLS, XLSX, TXT
- Max 10 MB per file
- Categorise, add remarks, download, delete

Employment History

- Track dept, designation, manager, shift changes
- Effective date ranges on each change

Experience & Skills

- Past work experience entries
- Skills with proficiency levels

2.3 Aadhaar Verification (Signzy)

- Send OTP to Aadhaar-linked mobile via Signzy API
- Verify OTP, store masked number (last 4 digits visible), mark employee as verified

2.4 Bulk Employee Import

- Download pre-formatted XLSX template with all required columns

- Upload completed template for bulk creation
- Row-by-row validation with error report (duplicate check, required fields)
- Supports all employee profile fields

03 Payroll Processing

3.1 Payroll Run

- Select company, month, and year to initiate a payroll run
- Filter by location, department, designation, salary type
- Attendance-based salary proration (calculates proportional salary for partial months)
- Formula-driven pay elements (overtime, bonus, variable pay)
- Monthly ad-hoc pay element inputs
- Preview before finalising — shows gross / net / deductions per employee
- Authorisation flag on completed runs

3.2 Statutory Deductions

Deduction	Employee	Employer	Notes
EPF	12% of basic	12% of basic	EPS portion capped at ₹15,000 wage ceiling
ESI	0.75% of gross	3.25% of gross	Applicable when gross $\leq$ ₹21,000/month
Professional Tax	Slab-based	—	State-specific slabs
TDS	Per IT computation	—	Monthly deduction from tax declaration

3.3 Payslip Management

- Individual payslip generation with full earnings and deductions breakdown
- Full payslip history per employee
- Printable format

04 Attendance Management

4.1 Attendance Recording

Status Code	Meaning
P	Present
A	Absent (NCP day — counted for PF)
CL	Casual Leave (approved)
FH	First Half / Half Day
WO	Week Off

4.2 Geo-fencing & Selfie Attendance

- Office location set via latitude / longitude per company
- Configurable geo-fence radius (in metres)
- Optional selfie capture at check-in
- Employee coordinates recorded with each punch

4.3 Shift Management

- Configurable shift types: check-in/out times, half-day and full-day hour thresholds
- Late check-in and early check-out grace periods
- Assign shift at onboarding; change via employment history

4.4 Correction Workflow

- Employees submit attendance correction requests with reason
- HR reviews and approves/rejects each request
- Approved corrections sync back to attendance records

4.5 Face / Biometric Approvals

- Biometric / face-based attendance entries reviewed by HR
- Bulk approve or reject biometric punches

05 Leave Management

Admin — Leave Types & Balances

- Configure leave types (paid/unpaid, gender filter, carry-forward rules, proration)
- Assign annual balances per employee per financial year
- Bulk balance assignment

Employee — Leave Application

- Apply with date range and session (full / half day)
- Auto-calculates working days (excludes weekends & holidays)
- Duplicate / overlap prevention
- Save as draft → submit when ready
- Optional handover notes

Manager — Approval Workflow

- Leave routed to reporting manager
- Approve or reject with remarks
- Attendance records automatically synced on decision

Leave Balance View

- Allocated, carry-forward, used, and available days per type
- Financial year selector

06 Loan Management

6.1 Loan Types

Salary Advance · Festival · Emergency · Medical · Housing · Vehicle · Education · Marriage · Personal · Other

6.2 Loan Application (Employee)

- Input: loan amount, interest rate, tenure (months), purpose
- Auto EMI calculation on submission
- Active loan check — prevents duplicate applications
- Track status and view repayment schedule

6.3 Approval Workflow

Step	Approver	Action
Step 1	Reporting manager	Approve / Reject with remarks
Step 2	Admin / Accounts	Final approval and disbursement

6.4 Loan Administration (Admin)

- Listing with status filter: Pending, Approved, Active, Closed
- Dashboard KPIs: total disbursed, active count, outstanding balance, overdue instalments
- Repayment schedule tracking per loan

07 Reimbursement Management

7.1 Claim Submission (Employee)

- Categories: Travel, Food, Medical, Office Supplies, Accommodation, Fuel, Telecom, Other
- Fields: title, description, expense date, claimed amount
- Receipt upload: JPG, PNG, PDF, WebP — max 5 MB
- View claim history and cancel pending claims

7.2 Claim Processing (Admin)

- Paginated claim listing with filters (status, employee, keyword search)
- Approve with approved amount and remarks — partial approval supported
- Reject with remarks
- Dashboard statistics: pending count, approved total, this-month total

08 Tax Declaration & TDS

8.1 Employee Declaration Form

Section	Fields
Regime	Old Regime / New Regime selector
HRA	Rent paid, metro city flag
Home Loan	Interest on home loan
Section 80C	EPF, PPF, ELSS, LIC premium, home loan principal, NSC, tuition fees, term insurance, others
Section 80CCD(1B)	NPS additional contribution
Section 80D	Medical insurance — self and parents separately
Section 80E	Education loan interest
Section 80G	Charitable donations
Section 80TTA	Savings account interest
Other income	Additional income sources

8.2 Tax Computation (HR)

- Auto-compute TDS from declaration: gross salary → deductions → standard deduction → taxable income → slab tax → rebate 87A → surcharge → cess → annual tax → monthly TDS
- List and view all declarations by company and financial year
- HR can approve declarations, locking them from further edits

09 Benefits Management

Plan Administration (Admin)

- Create benefit plans with name, category, sub-type, description, cover amount, annual / monthly value
- Auto-enrol flag, nominee flag
- Toggle active / inactive

Employee Benefits

- Enrol / un-enrol in available plans
- Tenure-based gratuity accrual and eligibility date
- PF corpus estimate
- Flexi benefit balance tracking

10 Salary & Compensation Setup

10.1 Pay Element Master

- Create earnings and deductions with name, type, taxability classification
- Company-level and global (shared across companies) elements
- Toggle active / inactive

10.2 Monthly Pay Element Entry

- Input variable amounts per designation per month
- Effective month / year ranges
- Requires HR authorisation before inclusion in payroll run

11 Employee Self-Service Portal

Module	What employees can do
Dashboard	Leave stats, profile completion indicator, recent activity feed
Profile	View and update contact, address, emergency contact; change profile photo
Leaves	Apply for leave, view full history, check balance by type and financial year
Payslips	View and download current and historical payslips
Salary	View current earnings/deductions structure and salary history
Loans	Apply for loans, track approval status, view repayment schedule
Reimbursements	Submit claims, upload receipts, track status, cancel pending claims
Tax Declaration	Enter investment declarations, view TDS preview, submit for HR approval
Benefits	View available plans, enrol / un-enrol, see coverage summary
Experience / Skills	Maintain CV details — work history and skills with proficiency
Org Chart	View own manager, peers (same reporting manager), and direct reports
Attendance Correction	Submit correction requests for missing or incorrect attendance
Password	Change login credentials

12 Reports & Analytics

12.1 Payroll Reports

Report	Description	Status
Payslip	Individual salary slip with full earnings / deductions breakdown	✓ Live
Salary Register	All employees' salary summary for a selected month	✓ Live
Salary Comparison (MoM)	Month-on-month variance analysis highlighting changes	✓ Live

12.2 PF & ESI Statutory Reports

Report	Form	Description	Status
PF ECR File	ECR	Electronic Contribution Record for EPFO portal upload	✓ Live
PF Challan	Form 5 / 10 / 12-A	Monthly PF remittance challan	✓ Live
PF Annual Return	Form 3A + 6A	Member-wise annual card + consolidated return (3-sheet Excel)	✓ Live
ESI Challan	Form 6	Monthly ESI remittance challan	✓ Live
ESI Contribution Register	Regulation 32	Half-yearly per-employee contribution register	✓ Live

12.3 Attendance & Leave Reports

Report	Description	Status
Attendance Register	Monthly attendance summary per employee	✓ Live
Attendance Time Register	Daily check-in / check-out time log	✓ Live
Leave Balance Report	Current leave balances per employee per leave type	✓ Live
Late / Absent / Half-Day	Attendance anomaly report with NCP / LWP details	✓ Live

12.4 Planned Reports

Income Tax (TDS)

- Form 16 (Part A & B)
- Form 24Q (quarterly)
- TDS deduction register
- IT computation sheet
- Investment declaration summary

Payroll & Disbursement

- Bank advice / NEFT file
- Net pay summary
- Arrear salary report
- Cash salary register

HR & Employee

- Employee master list
- New joiners / resigned report
- CTC breakup report
- Increment / revision report

Compliance & MIS

- Minimum wages compliance
- PT challan, LWF register
- Payroll cost MIS
- YTD report, headcount trend

12.5 Common Report Features

- Company, location, department, and employee type filters on all reports
- Date / period / financial year selector
- KPI strip at top showing key totals and member counts
- Monthly trend bar chart (where applicable)
- Signature strip — Prepared by / Verified by / Authorised signatory
- Print-optimised layout for all reports
- Excel export with formatted multi-sheet workbooks (column widths, header colours, totals rows)

13 Master Data Management

13.1 Dynamic Master Framework

- Any registered master table managed through a single generic interface
- Supports List / Create / Edit / Delete / Toggle-Active
- Search, filter, and pagination
- Per-table permission checks enforced

13.2 Built-in Master Tables

Master	Key Fields
Companies	Name, address, EPF code, ESI code, logo
Locations	Name, company, address coordinates
Departments	Name, company
Designations	Name, company, department
Shift Types	Check-in/out times, half-day / full-day thresholds, grace periods
Holiday Master	Date, name, type (national / regional / company), location mapping
Leave Types	Name, paid/unpaid, carry-forward rules, gender filter, proration flag
Pay Elements	Name, type (earning/deduction), taxability classification
Loan Types	Name, default interest rate
Reimbursement Categories	Name, company / global scope
Benefit Plans	Name, category, cover amount, annual value, auto-enrol flag

14 User Management & Permissions

14.1 User Administration

- Create users: full name, email, password, role, company, location assignments
- Edit details, change passwords, toggle active / inactive
- Multi-company and multi-location assignment per user

14.2 Permission Matrix

Permission Level	Scope
View	Can read data in the module
Add	Can create new records
Edit	Can modify existing records
Delete	Can remove records

- Permissions assigned per user, per module, per action
- Dynamic permission loading — new modules automatically appear in the permission management screen
- Master table permissions namespaced as Master_<TableName> per action
- Role hierarchy: SuperAdmin overrides all; Admin scoped to company

15 System Administration

15.1 Company Management

- Company logo upload (JPG, PNG, WebP, SVG — max 2 MB)
- Statutory codes: EPF code, ESI code
- Attendance settings per company (geofence radius, selfie toggle, weekly-off rules)

15.2 Multi-Tenancy

- Complete data isolation between companies at every query level
- SuperAdmin can view and manage all companies
- Company-level branding — logo appears in all reports and the portal

15.3 AI Chatbot

- In-app HR and payroll assistant powered by Claude AI (GitHub Models API)
- 20-turn conversation history per session
- Handles FAQs about payroll, statutory compliance, and HR policies

16 Integrations

Integration	Purpose	Details
Signzy	Aadhaar OTP verification	Send OTP to Aadhaar-linked mobile, verify, store masked number and verification status
GitHub Models (Claude AI)	In-app chatbot	20-turn conversation history, HR and payroll Q&A, rate-limit error handling
SQL Server Stored Procedures	Payroll & reporting engine	10+ stored procedures for payroll processing, attendance sync, and statutory report generation

Key Stored Procedures

Procedure	Purpose
usp_ProcessPayroll	Full payroll run execution
sp_AttendanceRegister	Monthly attendance report generation
sp_SalaryRegister	Salary summary report
sp_SalaryMOMComparison	Month-on-month salary variance
sp_PFECRFile	PF ECR file for EPFO upload
sp_PFChallan	PF monthly challan (Form 5/10/12-A)
sp_PFAnnualReturn	PF annual return (Form 3A + 6A)
sp_ESIChallan	ESI monthly challan (Form 6)
sp_ESIContribRegister	Half-yearly ESI contribution register
sp_LateAbsentHalfdayReport	Attendance anomaly report

17 Data Import / Export

Direction	What	Format	Notes
Import	Bulk employees	XLSX	Row-by-row validation with error report; duplicate checking; all profile fields supported
Export	All reports	XLSX	Multi-sheet formatted workbooks — column widths, header colours, subtotals, grand totals
Export	Payslips	Print / HTML	Print-optimised layout; works from browser print dialog
Export	PF ECR file	XLSX	EPFO-compatible column layout for direct upload
Download	Import template	XLSX	Pre-formatted with all required columns and example row

File Upload Capabilities

Upload Type	Accepted Formats	Max Size
Profile photos	JPG, PNG, WebP	—
Employee documents	PDF, DOC, DOCX, XLS, XLSX, TXT, JPG, PNG	10 MB
Reimbursement receipts	JPG, PNG, PDF, WebP	5 MB
Company logos	JPG, PNG, WebP, SVG	2 MB
Employee bulk import	XLSX only	—

18 Security

Control	Implementation
Anti-forgery tokens	Applied to all POST / PUT / DELETE form submissions
Authorisation filter	[Authorize] attribute on every controller
Role-based claims	CompanyId and LocationIds embedded in the auth cookie
Password hashing	Salted hash (PBKDF2) — plain-text passwords never stored
File type validation	Allowlist enforcement on all upload endpoints
Parameterised queries	ADO.NET SqlCommand with AddWithValue throughout; no string-concatenated SQL in application code
Company data isolation	All data queries filtered by CompanyId derived from auth claims
Session timeout	8 hours default; 30 days with Remember Me option

Dynamic WHERE clauses in stored procedures that include filter parameters (location, department, employee type) use string concatenation internally within SQL Server. All external inputs are passed as typed SqlParameter before reaching the SP — application-layer injection is prevented.

— Application Metrics Summary

20 FEATURE MODULES	35+ CONTROLLERS	9 LIVE REPORTS	30+ PLANNED REPORTS	10+ STORED PROCEDURES	11 MASTER TABLES	4 USER ROLES
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Category	Details
Framework	ASP.NET Core 10 (C#) · Razor Views · ClosedXML for Excel
Database	SQL Server (SQLEXPRESS) · ADO.NET with stored procedures
Architecture	MVC · Multi-tenant (multi-company) · Role-based access control
Deployment	Kestrel HTTP server on port 5020; AWS / cloud deployable
File storage	Local /uploads/ directory (profiles, documents, receipts, logos, imports)
External APIs	Signzy (Aadhaar verification) · GitHub Models / Claude AI (chatbot)
Export formats	XLSX (formatted multi-sheet) · HTML / Print (payslips and reports)
Indian compliance	EPF · ESI · Professional Tax · TDS · Form 3A · Form 6A · ECR · Form 6 · Indian financial year (Apr–Mar)

PayrollProCRM is designed for Indian businesses and is fully compliant with EPF & MP Act 1952, ESI Act 1948, and the Income Tax Act 1961. All statutory calculations, forms, and due dates are built into the platform.