Business Setting

The **Business Settings** module in TankhaPay acts as the central hub for configuring your organization’s core information, payroll structure, and compliance setup.

In this video, we walk you through how to manage company details, including adding your logo, billing address, and customizing salary slips. You can define your **payout date**, whether it’s the last working day or any preferred salary cycle.

TankhaPay allows flexible **salary structuring**, where you can create and manage components, activate or deactivate structures, and define calculations based on your company policies.

The module also ensures compliance by maintaining records for **PF, ESIC, TDS, and group health insurance**. You can manage multiple organizational units across India and map employees accordingly.

Overall, Business Settings helps streamline administration, ensure compliance, and customize workflows as per your organization’s structure.

- Overview Video

Overview Video

https://www.youtube.com/embed/_1G56J17iaQ

Step-by-Step Tutorial Guide

Overview

This tutorial explains how to configure and manage the Business Settings module in TankhaPay. The walkthrough covers:

- Accessing Business Settings
- Managing organization information
- Configuring company details
- Managing branches and departments
- Configuring payroll and attendance settings
- Setting organizational policies
- Managing system preferences

Step 1: Open the Business Settings Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, locate **Business Settings**.
3. Click on **Business Settings** to open the module.
4. The settings dashboard displays organizational configuration options.

This section allows administrators to manage company-level configurations and operational settings.

Step 2: View Organization Profile Details

1. Open the organization or company profile section.
2. Review existing business information.
3. Details may include:
    - Company Name
    - Business Type
    - Company Address
    - Contact Information
    - Registered Details
    - Organization Logo
4. Edit or update details if required.

Maintaining accurate organization information helps ensure proper system configuration and compliance.

Step 3: Update Company Information

1. Click on the edit or update option.
2. Modify organization details such as:
    - Company Name
    - Registered Address
    - Phone Number
    - Email Address
    - GST or Tax Information
3. Save the updated details.

This ensures all company records remain current within the system.

Step 4: Configure Branch Settings

1. Navigate to the **Branch Management** section.
2. View existing branches or locations.
3. Add a new branch if required.
4. Configure details such as:
    - Branch Name
    - Branch Code
    - Address
    - Contact Details
    - State or Region
5. Save the branch configuration.

Branch setup helps organizations manage multiple operational locations efficiently.

Step 5: Manage Departments and Designations

1. Open the department management section.
2. Add or edit departments.
3. Configure:
    - Department Name
    - Department Code
    - Reporting Structure
4. Open the designation section.
5. Add or manage employee designations.

This helps maintain a structured organizational hierarchy.

Step 6: Configure Attendance Settings

1. Navigate to the attendance settings section.
2. Configure organization attendance policies.
3. Settings may include:
   - Shift Timings
   - Working Hours
   - Grace Period
   - Overtime Rules
   - Attendance Calculation Method
4. Save the attendance settings.

These configurations help standardize employee attendance management.

Step 7: Configure Payroll Settings

1. Open the payroll settings section.
2. Configure payroll-related preferences.
3. Available settings may include:
   - Salary Structure
   - Payroll Cycle
   - Payment Mode
   - Salary Components
   - Deduction Rules
   - Statutory Settings
4. Save the payroll configuration.

This ensures payroll processing aligns with company policies.

Step 8: Configure Leave and Holiday Preferences

1. Navigate to leave or holiday-related settings.
2. Configure:
   - Leave Calendar
   - Holiday Policies
   - Weekly Off Rules
   - Leave Applicability
3. Save all changes.

These settings help organizations manage employee leave structures consistently.

Step 9: Manage User Roles and Permissions

1. Open the user management or permissions section.
2. Review available user roles.
3. Configure access permissions for:
   - HR Teams
   - Managers
   - Employees
   - Finance Teams
   - Admin Users
4. Save permission settings.

Role-based access helps maintain data security and operational control.

Step 10: Configure System Preferences

1. Open the system preferences section.
2. Configure organizational preferences such as:
   - Notification Settings
   - Email Preferences
   - Language Settings
   - Time Zone
   - Dashboard Preferences
3. Save the configured preferences.

These settings help personalize the platform according to business requirements.

Step 11: Review and Save All Configurations

1. Review all configured business settings.
2. Verify organization details and operational preferences.
3. Save the final configuration.
4. Ensure all updates are applied successfully.

This helps maintain a properly configured and operational HRMS environment.

Key Benefits of the Business Settings Module

- Centralized organization configuration
- Flexible payroll and attendance setup
- Structured branch and department management
- Improved access control and security
- Standardized HR operations
- Better compliance and policy management
- Efficient system administration

End of Tutorial

You have now completed the walkthrough of the TankhaPay Business Settings module.

The Business Settings module helps organizations efficiently configure company information, operational policies, payroll settings, attendance structures, and system preferences from a centralized platform.