Compliance Setup

- Overview Video

Overview Video

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

Step-by-Step Tutorial Guide

Step 1: Open the Compliance Setup Module

1. Log in to the TankhaPay Business Portal.
2. From the left-side navigation menu, navigate to **Compliance Management**.
3. Click on **Compliance Setup**.

The Compliance Setup page displays all configured compliance policies.

Step 2: Create a New Compliance Setup

1. Click **Add Compliance** or **Create New Compliance**.
2. The **Set Up Compliance** window opens.

This page allows you to configure statutory compliance for employees.

Step 3: Select the Compliance Type

1. Click the **Compliance Type** dropdown.
2. Select the statutory compliance you want to configure.

Examples may include:

- EPF (Provident Fund)
- ESIC
- Professional Tax
- Labour Welfare Fund (LWF)
- Other statutory compliances

Select the compliance applicable to your organization.

Step 4: Select the Applicable State

1. Open the **State** dropdown.
2. Choose the state where the compliance policy applies.

State-specific compliance ensures statutory rules are applied correctly.

Step 5: Configure Employee Applicability

1. Select the employees or employee category for whom the compliance setup is applicable.
2. Depending on your configuration, you can assign compliance based on:
    - Employee
    - Department

- Designation
- Branch
- Business Unit

This ensures compliance is applied only to eligible employees.

Step 6: Set the Effective Date

1. Click the **Effective From** field.
2. Select the date from which the compliance rule should become active.

The selected date determines when the compliance calculations begin.

Step 7: Configure Additional Compliance Details

Depending on the selected compliance type, configure additional settings such as:

- Compliance Category
- Contribution Rules
- Employer Contribution
- Employee Contribution
- Applicable Salary Limits
- Compliance Frequency

These settings ensure payroll calculations follow statutory requirements.

Step 8: Review the Compliance Configuration

Before saving, verify:

- Compliance Type
- Applicable State
- Employee Applicability
- Effective Date
- Compliance Rules

Ensure all information is accurate before proceeding.

Step 9: Save the Compliance Setup

1. Click **Save** or **Submit**.
2. Wait for the confirmation message.

The compliance configuration is successfully created and becomes available for payroll processing.

Step 10: Verify the Created Compliance Record

1. Return to the Compliance Setup list.
2. Locate the newly created configuration.
3. Verify:
   - Compliance Name
   - State
   - Effective Date
   - Status

This confirms the compliance setup has been saved successfully.

Step 11: Edit Existing Compliance Settings

If organizational or statutory requirements change:

1. Locate the compliance record.
2. Click the **Edit** icon.
3. Update the required information.
4. Save the changes.

This ensures compliance settings remain aligned with the latest regulations.

Step 12: Manage Compliance Configurations

From the Compliance Setup page, administrators can:

- View compliance records
- Edit compliance settings
- Activate or deactivate compliance
- Search and filter compliance configurations
- Maintain statutory compliance policies

Regular reviews help ensure ongoing compliance with legal and payroll requirements.

Key Benefits of Compliance Setup

- Centralized statutory compliance management
- State-wise compliance configuration
- Employee-specific applicability

- Accurate payroll compliance calculations
- Simplified compliance administration
- Improved statutory accuracy
- Reduced manual configuration effort

End of Tutorial

You have successfully learned how to configure **Compliance Setup** in the TankhaPay Business Portal. Proper compliance configuration ensures statutory deductions and employer contributions are calculated accurately, helping organizations maintain compliance while streamlining payroll operations.