

Overview Video

<https://www.youtube.com/embed/CdauWmRwUml>

Step-by-Step Tutorial Guide

Step 1: Open the Leave Type Module

1. Log in to the TankhaPay Business Portal.
2. From the left-side navigation menu, click on **Leave Management**.
3. Select **Leave Type**.

The Leave Type page displays all existing leave categories configured in the system.

Step 2: View Existing Leave Types

1. Review the list of available leave types.
2. The table may display details such as:
 - Leave Name
 - Leave Code
 - Leave Category

- Applicable Employees
- Status

3. Use the search option to locate a specific leave type if required.

This helps administrators manage all leave categories from one place.

Step 3: Create a New Leave Type

1. Click on **Add Leave Type** or **Create New Leave Type**.
2. The **New Leave Type** form opens.

This form is used to configure a new leave category.

Step 4: Enter Basic Leave Details

Fill in the required information, including:

- Leave Name
- Leave Code
- Description (if applicable)

Examples include:

- Casual Leave (CL)
- Sick Leave (SL)
- Earned Leave (EL)
- Maternity Leave
- Paternity Leave
- Compensatory Off (CO)

Using meaningful names makes leave policies easier to manage.

Step 5: Select the Leave Category

1. Choose the appropriate leave category.
2. Depending on your organization's configuration, categories may include:
 - Paid Leave
 - Unpaid Leave
 - Comp-Off
 - Restricted Holiday
 - Special Leave

The selected category determines how the leave is processed during payroll and attendance calculations.

Step 6: Configure Leave Applicability

1. Select which employees can use this leave type.
2. Applicability may be based on:
 - All Employees
 - Department
 - Designation
 - Employment Type
 - Gender
 - Location or Branch

This allows organizations to create leave policies for specific employee groups.

Step 7: Configure Leave Rules

Define the leave policy for the selected leave type.

Settings may include:

- Maximum Leave Balance
- Minimum Leave Balance
- Leave Accrual Method
- Carry Forward Eligibility
- Leave Encashment
- Half-Day Leave Allowed
- Negative Leave Allowed

These settings determine how the leave behaves throughout the leave cycle.

Step 8: Configure Supporting Options

If applicable, configure additional settings such as:

- Supporting document required
- Medical certificate required
- Reason mandatory
- Manager approval required
- Notice period restrictions

These options help enforce organization-specific leave policies.

Step 9: Set the Leave Status

1. Choose whether the leave type should be:
 - **Active**
 - **Inactive**

Only active leave types will be available for employee leave applications.

Step 10: Save the Leave Type

1. Review all configured information:

- Leave Name
- Leave Code
- Category
- Applicability
- Leave Rules
- Status

2. Click **Save**.

The new leave type is successfully added to the system.

Step 11: Verify the Leave Type

1. Return to the Leave Type list.

2. Locate the newly created leave type.

3. Verify:

- Leave Name
- Leave Code
- Status
- Applicability

This confirms that the leave type has been created successfully.

Step 12: Edit or Manage Leave Types

From the Leave Type page, administrators can:

- View leave details
- Edit existing leave types
- Activate or deactivate leave types
- Update leave rules
- Modify employee applicability

Regular updates ensure leave policies remain aligned with organizational requirements.

Key Benefits of the Leave Type Module

- Centralized leave policy management
- Flexible leave configuration
- Employee-specific leave applicability
- Automated leave rule enforcement
- Better attendance and payroll integration
- Simplified leave administration
- Improved compliance with organizational policies

End of Tutorial

You have successfully learned how to create and manage **Leave Types** in the TankhaPay Business Portal. Properly configured leave types help organizations standardize leave policies, automate leave processing, and ensure accurate attendance and payroll management.

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