

Document Master

- [Overview Video](#)

Overview Video

<https://www.youtube.com/embed/nyHgpjcq96g>

Step-by-Step Tutorial Guide

Step 1: Open the Document Master Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, navigate to **Document Master**.
3. Click **Document Master** to open the module.
4. The Document Master page displays all existing document categories configured in the system.

This module allows administrators to define and manage employee document types required across the organization.

Step 2: View Existing Document Types

1. On the Document Master page, review the list of available document types.
2. Each document record displays information such as:
 - Document Name
 - Status

- Mandatory/Optional requirement
- Created Date

3. Use the search option to quickly locate a specific document type.

This page provides a centralized repository for all employee document configurations.

Step 3: Create a New Document Type

1. Click **Add Document** or **Create Document**.
2. The document creation form opens.
3. Begin configuring the new document type.

This feature allows organizations to define the documents employees are required to upload.

Step 4: Enter Document Details

1. Enter the **Document Name**.
2. Select the appropriate **Document Category**, if available.
3. Provide a description for the document, if required.
4. Configure whether the document is:
 - Mandatory
 - Optional
5. Review all entered information before saving.

Ensure all mandatory fields are completed accurately.

Step 5: Configure Document Settings

1. Enable or disable the document based on organizational requirements.
2. Configure the document's applicability, if available.
3. Verify the selected settings before proceeding.

These settings determine how the document will be used throughout the employee lifecycle.

Step 6: Save the Document Type

1. Click **Save** or **Submit**.
2. The system saves the new document configuration.
3. A confirmation message is displayed upon successful creation.

The document type is now available for employee document management.

Step 7: Manage Existing Documents

From the Document Master page, you can manage existing document types.

Available actions may include:

- View document details
- Edit document information
- Enable or disable document types
- Search document records
- Update document configurations

This helps administrators maintain an organized and up-to-date document repository.

Key Benefits of Document Master

- Centralized document type management.
- Standardizes employee document requirements.
- Configure mandatory and optional documents.
- Simplifies employee document collection.
- Improves document consistency across the organization.
- Supports efficient employee onboarding and compliance.

End of Tutorial

You have now completed the **Document Master** walkthrough in TankhaPay.

This module enables administrators to configure and manage employee document types from a centralized location, ensuring standardized document collection and efficient document management across the organization.