

Leave Template

Leave Settings

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Set Leave Template

[Leave Template Bulk Assign](#)

1. Use the standard leave template or create a custom template.
2. Click on set as default to use the template for all your employees.
3. Alternatively, you can use the "Leave Template Bulk Assign" option to select multiple employees and assign a specific template to them.

Standard

Default



CL **6** ML **6**
Weekly off **Sunday (All)**

Leave Calendar **Financial Year**
Attendance Approval **Required**

My Current

Set As Default



PL **2**
Weekly off **Sunday (All), Saturday (2,4)**

Leave Calendar **Calendar Year**
Attendance Approval **Not Required**

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Add New Template

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Template Name*

Enter Template name

Weekend*

	Week 1	Week 2	Week 3	Week 4	Week 5
Sunday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thursday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In this section, you get access to a standard leave template along with the option to create a new one. When you choose to create a new template, you'll first enter the template name, followed by a table displaying weekdays and the number of weeks in a month, where you can checkbox the applicable weekly offs for employees.

Under the Types of Leave section, select leave codes (PL, CL, SL, etc.), number of days, and whether the leave should be carried forward. You can also choose how it should accumulate (monthly, yearly, one-time), after how many minimum paid days it will be effective, after which maximum limit will be calculated accordingly. There's a delete icon under the Action column, and an Add button below it to include more leave types.

You can choose whether the leave calendar should follow the calendar year or financial year.

In the Restrictions section, set rules like:

- Whether employees can exceed leave balance.
- Duration allowed (full/half day), number of past/future dates for which leave can be applied.
- Min/max leaves per application, minimum gap between applications.
- Enable file upload if leave exceeds a certain duration.
- Limit the number of leave applications within a period.
- Activate probation period where you can define its length, and assign a post-probation template Under the Week Off Absent Policy, choose to either:
 - Consider weekends between two absent days as absent.
 - Or, mark weekends as absent if more than a specified number of days are missed. Once done, click *Add New Template*. You can also set the template as default. Once a template is assigned to employees, it cannot be edited. There is also a button in the right upper corner *Leave Template Bulk Assign*. This section allows you to assign leave templates and upload leave balances for employees. A search filter lets you find employees by name and status (Assigned or Not Assigned). Below the filter, a table displays employee details such as name, mobile number, date of joining, date of leaving (if applicable), assigned leave templates, effective from date, and template details (number of leaves).

There are two main options available:

1. **Bulk Assign Template** - After selecting individual or multiple employees, you can assign a leave template with an effective date and click on Update to apply.
2. **Bulk Opening Balance** - After selecting employees, click Bulk Opening Leave Balance, then choose filters for month, year, status, and template. In the Action dropdown, select either Bulk Upload or Manual.

In Bulk Upload, download the template to view existing templates and leave counts for selected employees. Modify as needed and upload it back. If no errors are found, a *Confirm Open Balance* button will appear - click to finalise.

In Manual, a table appears showing the employee name, joining/leaving dates, and leave balances for the current financial year. You can update the leave count directly and click

on *Update Leave Balance* to update.

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