

HR Administrator Manual

Everything the HR team needs: signing the company up, the data to gather before anyone is onboarded, the setup wizard, adding people, and running leave, attendance, helpdesk, documents and email day to day.

Version 1.5

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Portal hrms.xcodefix.com

Screenshots are taken from a demonstration company. Names, addresses and identifiers are fictitious.

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1. About this manual

This manual is for the person who sets up and runs XcodeFix HRMS on behalf of a company — usually the HR manager, the founder, or whoever holds the **Organisation admin** login. It covers the whole lifecycle: signing the company up, deciding what data you need before anyone is onboarded, running the setup wizard, adding people, and then administering leave, attendance, helpdesk, documents and engagement day to day.

A separate [Employee Manual](#) covers the same portal from the employee's side. Send that one to your staff; keep this one for yourself.

About the screenshots. Every screen in this manual was captured from a live portal belonging to a demonstration company, **Northwind Technologies** — 18 employees across six departments, with real leave applications, attendance history, tickets, documents and posts. Names, email addresses and identifiers are fictitious. Your own portal will look identical; only the data changes.

What the portal is made of

XcodeFix HRMS is organised into **modules**. Each one can be switched on or off for your company, and anything switched off disappears completely — it leaves no empty menu item behind.

MODULE	WHAT IT DOES	ALWAYS ON?
Core HR	Employee records, org structure, profiles, company settings	Yes
Approvals & To Do	One inbox for everything awaiting your decision	Yes
Leave	Leave types, policies, balances, applications, calendars	Optional
Attendance	Sign in/out, daily rollup, shifts, regularisation	Optional
Helpdesk	Employee tickets with categories, priorities and owners	Optional
Document Center	Payslips, Form 16, policies, forms, letter requests	Optional
Expenses	Expense claims with receipts, approval and payment tracking	Optional
Recruitment	Job openings, an applicant pipeline, interviews and offers	Optional
Engage	Company feed: announcements, kudos, celebrations	Optional

Who can do what

Every person with a login has exactly one role. Roles are fixed — you assign them, you do not design them — which keeps access predictable.

ROLE	TYPICAL HOLDER	REACH
Organisation admin	HR head, founder	Everything inside your company, including company settings, modules, roles and the audit trail
HR manager	HR executive, HR business partner	Employees, leave, attendance, holidays, helpdesk, documents, letters, engage — but not company settings, modules or roles
Manager	Anyone with direct reports	Their own portal, plus approving leave and attendance corrections for their reports
Employee	Everyone else	Their own record, leave, attendance, tickets, documents and the feed

Keep two administrators. An organisation admin cannot change their own role — another administrator has to do it. If you are the only admin and you lose access, nobody inside your company can restore it.

2. Before you onboard: the data to have ready

This is the chapter to read first. Setting the portal up takes about thirty minutes *if* the information below is already decided and to hand. If it is not, the wizard will stall at whichever step you have not thought about, and half-finished structure is much harder to correct once people are in the system.

Collect the following **before** you sign up.

2.1 Company information

ITEM	REQUIRED	NOTES
Company name (trading name)	Yes	Appears in the sidebar and on every email your team receives
Registered legal name	Recommended	Used on letters and statutory documents — e.g. "Northwind Technologies Private Limited"
Portal address (subdomain)	Yes	Short, lowercase, permanent-feeling. Chosen at signup
Registered address, city, state, PIN	Recommended	Printed on employment and address-proof letters
Contact phone and website	Optional	
Country, time zone, currency, date format	Yes	Defaults are India / Asia Kolkata / INR / d M Y
Company logo	Recommended	PNG, JPG, WEBP or SVG, up to 1 MB. Square or wide both work
Brand colour	Optional	A single hex colour used for buttons, highlights and email headers
Administrator name, work email, password	Yes	The email must be reachable — signup is confirmed by a verification link

2.2 Organisation structure

Three lists, and the earlier they are right the less rework later. Every one of them can be edited afterwards, but employees are attached to them, so renaming is easy and deleting is not.

- **Grades** — seniority bands. Optional, but they are what lets leave entitlement differ by seniority later without editing everyone one at a time.
- **Departments** — the functional groups people belong to. Give each a short code if you use one (ENG, SLS, HR). Decide who heads each department; you can set the head once the people exist.
- **Designations** — job titles, with an optional seniority level. Keep the list tight: one title per real job, not one per person.

- **Locations** — offices, plus a "Remote" entry if you have home-based staff. Address, city and state are worth filling in.

2.3 Leave policy decisions

For each kind of leave you offer, decide these before you start. The wizard suggests a sensible Indian default set (Privilege, Sick, Casual, Comp Off, Loss of Pay) which you can accept and then adjust.

DECISION	EXAMPLE
Short code and name	PL — Privilege Leave
Annual quota (days)	18
How it accrues	Monthly, quarterly, yearly, or not at all
Carry-forward cap	Up to 12 days into next year
Paid or unpaid	Paid (Loss of Pay is the unpaid one)
Half days allowed?	Yes — the application then asks for a session on each end
Attachment required?	Sick Leave over N days often needs a certificate
Minimum service before it can be used	0 months for most, 6 months for Maternity
Maximum consecutive days	15
Notice required	3 days for planned leave, 0 for sick
Restricted to a gender?	Maternity — female; Paternity — male
Calendar colour	Used across the leave calendar

2.4 Working hours and shifts

- Shift code and name, e.g. GEN — General Shift
- Start and end time, and the unpaid break in minutes
- **Grace minutes** — how late someone may arrive and still count as on time (15 is typical)
- **Half-day minutes** and **full-day minutes** — the work thresholds that decide how a day is marked (240 and 480 are typical)
- Weekly offs for that shift, e.g. Saturday and Sunday
- Which shift is the default for new joiners
- **Regularisation window** — how many days back an employee may ask for a correction (14 is typical)

2.5 Holiday calendar

A list of holidays for the current calendar year: date, name, and whether it is **restricted** (an optional holiday the employee chooses rather than one everybody gets). The wizard offers a suggested Indian list you can edit. If different offices observe different days, create more than one holiday calendar and attach each employee to the right one.

2.6 Employee master data

This is the big one. For each person you are onboarding, the portal distinguishes between what it *needs* to create the record and what makes the record genuinely useful.

FIELD	STATUS	WHY IT MATTERS
First name	Mandatory	Identity throughout the portal
Work email	Mandatory	This is the sign-in identity and where every notification goes. It must be unique in your company and reachable
Joining date	Mandatory	Drives leave accrual, probation and service length
Gender, marital status	Mandatory (may be "Prefer not to say")	Gender gates gender-specific leave types
Employment type, status	Mandatory	Full time / part time / contract / intern; active / on notice / resigned / exited
Employee code	Auto-filled	The next code in sequence is proposed; overwrite it to match your existing numbering
Last name	Strongly recommended	Needed for letters and for telling people apart
Grade	Recommended	Lets leave policies be granted by band rather than person by person
Department, designation, location	Strongly recommended	Filters, org charts and reporting all lean on these
Reports to	Strongly recommended	This is the approver for leave and attendance corrections. Without it, requests have nowhere to go and land on HR
Shift	Strongly recommended	Decides how attendance is judged; falls back to the organisation default
Holiday calendar	Recommended	Falls back to the organisation default
Personal email, phone, date of birth	Recommended	DOB drives birthday posts in Engage

FIELD	STATUS	WHY IT MATTERS
Probation end date	Recommended	Surfaces "confirmations due" on the HR home screen
Exit date	Only at exit	Leave blank while the person is employed

2.7 Statutory, payroll and personal details

These are not needed to create the record and are not part of the bulk import. Collect them on or just after day one — most companies gather them with a joining form. Statutory identifiers are **encrypted at rest** and only ever displayed as the last four characters.

Statutory

- PAN
- Aadhaar
- UAN and PF number
- ESI number, where applicable

Payroll

- Bank name
- Bank account number
- IFSC code

Personal

- Residential address, city, state, PIN
- Blood group
- Emergency contact: name, relationship, phone
- Family members and dependants, with dates of birth
- Previous employment history
- Assets issued: laptop, phone, access card, asset tag and serial

2.8 Documents to collect before day one

The Document Center holds two kinds of file: company-wide documents everyone can see, and personal documents visible only to that employee. A typical joining pack:

From the employee

- Signed offer letter
- Photo ID and address proof

- PAN card
- Educational certificates
- Relieving and experience letters from the previous employer
- Last three salary slips, if you ask for them
- Cancelled cheque or bank passbook page
- Passport-size photograph

Published by you

- Employee handbook
- Leave policy
- Attendance and work-hours policy
- Code of conduct
- Information security policy
- POSH policy and committee details
- Reimbursement, travel and investment declaration forms

2.9 Readiness checklist

Do not start the wizard until you can tick every line.

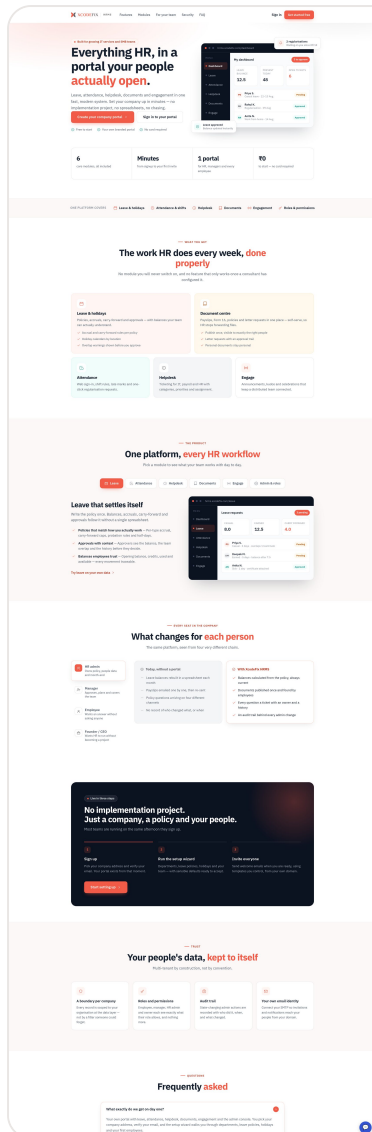
READY	
☐	Company name, legal name, address and logo
☐	An administrator email address you can receive mail on right now
☐	Department list
☐	Designation list
☐	Location list
☐	Grade list, if entitlement or reporting will follow seniority
☐	Leave types with quota, accrual, carry-forward and notice rules
☐	Decision on which leave types may be cashed in, and any yearly cap
☐	Decision on whether comp off is offered, and which type it credits
☐	Shift timings, grace and half/full-day thresholds, weekly offs

READY

- ☐ Holiday calendar for the current year
- ☐ Employee list with work email, joining date, department, designation, location and manager
- ☐ Decision on who gets which role (admin / HR manager / manager / employee)
- ☐ Policy documents ready to upload
- ☐ Decision on whether to send invitations immediately or on a chosen day

3. Signing your company up

Go to hrms.xcodefix.com and choose **Get started**.



The public site. Signing up is self-service — no sales call is required.

XcodeFix HRMS
Multi-tenant HRMS platform

Create your account

Set up your company's HR portal in a couple of minutes.
No card required.

Company name *

Portal address *

Your team will sign in at [your-company.hrms.xcodefix.com](#)

Your full name *

Work email address *

We will send a verification link here.

Password *

At least 10 characters, including a letter and a number.

Confirm password *

Industry

Select...

Team size

Select...

☐ I agree to the [Terms of Service](#) and [Privacy Policy](#).

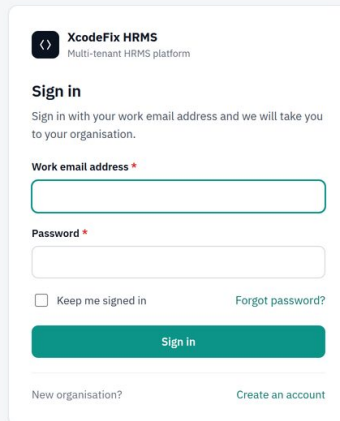
Create account

Already have an account? [Sign in](#)

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Signup asks for the company, your portal address, and the first administrator account.

1. Enter the **company name**. A portal address is suggested from it; edit it if you want something shorter. The address is checked for availability as you type.
2. Enter the **administrator's name, work email and password**. This account becomes the first organisation admin.
3. Pick your **industry** and **company size**, accept the terms, and submit.
4. Check the administrator's inbox for the **verification email** and click the link. The organisation stays pending until you do.
5. Sign in. You land straight in the setup wizard.

The image shows a sign-in interface for XcodeFix HRMS. At the top, there is a logo consisting of a square with a stylized 'X' and the text 'XcodeFix HRMS' followed by 'Multi-tenant HRMS platform' in smaller text. Below this is the heading 'Sign in' and a subtext 'Sign in with your work email address and we will take you to your organisation.' There are two input fields: 'Work email address *' and 'Password *'. Below the password field, there is a checkbox labeled 'Keep me signed in' and a link 'Forgot password?'. A large teal button labeled 'Sign in' is positioned below these elements. At the bottom of the form, there are two links: 'New organisation?' and 'Create an account'.

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Sign-in. Everyone in your company uses this screen, employees included.

If the verification email does not arrive, check spam first, then use **Resend** on the pending screen. Signup, sign-in and invitation emails are all rate-limited to stop abuse, so a burst of retries will be throttled — wait a minute between attempts.

4. The setup wizard, step by step

Seven steps. You can go back to any step you have already passed, and everything you set here stays editable afterwards from **Administration** in the sidebar — the wizard is a fast start, not a one-time commitment.

Step 1 – Company

The screenshot shows the 'Step 1 – Company' setup wizard for 'Brightpath Consulting'. At the top, a progress bar indicates seven steps: STEP 1 (Company), STEP 2 (Structure), STEP 3 (Leave), STEP 4 (Shifts), STEP 5 (Holidays), STEP 6 (People), and STEP 7 (Finish). The current step, STEP 1, is highlighted. Below the progress bar, the title 'Tell us about your company' is followed by a note: 'These details appear across the portal and on every email your team receives.' The form contains several input fields: 'Company name' (filled with 'Brightpath Consulting'), 'Registered legal name' (filled with 'Brightpath Consulting LLP'), 'Website' (filled with 'https://www.brightpath-demo.example'), 'Time zone' (dropdown menu set to 'India (IST)'), 'Country' (filled with 'India'), 'Contact phone' (filled with '+91 22 6712 4400'), 'City' (filled with 'Mumbai'), 'State' (filled with 'Maharashtra'), and 'PIN / postal code' (filled with '400013'). Below these fields is the 'Registered address' field, filled with '701, Peninsula Business Park, Lower Parel'. A 'BRANDING' section follows, with a note: 'Your logo and colour are used in the portal sidebar and on emails to your team.' It includes a 'Company logo' field with a 'Choose File' button and 'No file chosen' text, and a 'Brand colour' field with a teal color swatch. At the bottom left, it says 'Step 1 of 7', and at the bottom right, there is a 'Save and continue' button.

Company details, address, time zone and branding.

Fill in the legal name, address and contact details, then upload your logo and set the brand colour. These details appear across the portal and on every email your team receives, so it is worth doing properly now rather than later.

Step 2 — Structure

 **Brightpath Consulting**
Setting up your HR portal

STEP 1
Company

STEP 2
Structure

STEP 3
Leave

STEP 4
Shifts

STEP 5
Holidays

STEP 6
People

STEP 7
Finish

Departments, designations and locations

Add the departments, job titles and offices you use. You can always add more later.

DEPARTMENTS

e.g. Engineering, Sales, Human Resources

Consulting × Finance & Admin × Operations ×

Type a department and press Enter

+ Add

Common choices: Engineering Human Resources Finance Sales Marketing

DESIGNATIONS

e.g. Software Engineer, Team Lead, Manager

Business Analyst × Consultant × Principal Consultant × Senior Consultant ×

Type a designation and press Enter

+ Add

Common choices: Software Engineer Senior Software Engineer Team Lead Manager Director

LOCATIONS

e.g. Coimbatore, Chennai, Remote

Mumbai HQ × Remote — India ×

Type a location and press Enter

+ Add

Common choices: Head Office Remote

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Save and continue

Departments, designations and locations are entered as chips — type, press Enter, repeat.

Add your departments, designations and locations. Suggestions are offered for a company of your size and industry; click one to add it, or type your own. Nothing here is permanent — you can add more from Administration at any time.

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Step 3 – Leave

 **Brightpath Consulting**
Setting up your HR portal

STEP 1
Company

STEP 2
Structure

STEP 3
Leave

STEP 4
Shifts

STEP 5
Holidays

STEP 6
People

STEP 7
Finish

Leave types and entitlements

We have pre-filled the leave types most Indian companies use. Adjust the yearly entitlements, remove what you do not need, or add your own.

CODE	LEAVE TYPE	DAYS / YEAR	ACCRUAL	CARRY FORWARD	PAID
PL	Privilege Leave	12	Monthly	12	☒
SL	Sick Leave	12	Yearly	0	☒
CL	Casual Leave	6	Yearly	0	☒

+ Add a leave type

Accrual decides when the entitlement lands: **Yearly** credits the full amount in January, **Monthly** adds one twelfth each month, and **On request** grants nothing automatically (used for comp-off and loss of pay).

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Save and continue

Leave types with quota, accrual and carry-forward.

A default Indian set is proposed. For each type set the annual quota, how it accrues and the carry-forward cap. Detailed policy rules — notice days, maximum consecutive days, minimum service, gender restriction, attachment requirement — are set afterwards under **Administration** → **Leave types & policies**.

Step 4 – Shifts

Brightpath Consulting

Setting up your HR portal

STEP 1

Company

STEP 2

Structure

STEP 3

Leave

STEP 4

Shifts

STEP 5

Holidays

STEP 6

People

STEP 7

Finish

Shifts and working hours

Add every shift your team works. Attendance, late marks and leave day counts are all calculated from these, and new employees start on whichever one you mark as the default.

Default for new employees

Shift code *

GEN

Shift name *

General Shift

Start time *

09:30 AM

Shown on the attendance calendar:

End time *

06:30 PM

Break (minutes)

60

Late grace (minutes)

15

An end time before the start time means the shift runs overnight.

Deducted to give actual working hours.

Arrivals within this window are not late.

WEEKLY OFF

☐ Mon

☐ Tue

☐ Wed

☐ Thu

☐ Fri

☒ Sat

☒ Sun

Days marked off are excluded from leave day counts.

+ Add another shift

Most companies start with one general shift and add night or rotational shifts later. You can add, edit and reassign shifts any time from [Settings](#) -> [Shifts](#).

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Save and continue

Shift timings, break, grace period and weekly offs.

Define at least one shift and mark it the default. Grace, half-day and full-day minutes decide how each day is judged when attendance rolls up overnight.

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Step 5 – Holidays

 **Brightpath Consulting**
Setting up your HR portal

STEP 1
Company

STEP 2
Structure

STEP 3
Leave

STEP 4
Shifts

STEP 5
Holidays

STEP 6
People

STEP 7
Finish

Holiday calendar

We have suggested the national holidays for 2026. Edit the list to match your company calendar.

DATE	HOLIDAY	RESTRICTED
01/01/2026	New Year's Day	☐ Optional (RH)
01/26/2026	Republic Day	☐ Optional (RH)
03/04/2026	Holi	☐ Optional (RH)
03/21/2026	Id-ul-Fitr	☒ Optional (RH)
04/14/2026	Dr. Ambedkar Jayanti	☒ Optional (RH)
05/01/2026	Labour Day	☐ Optional (RH)
08/15/2026	Independence Day	☐ Optional (RH)
09/05/2026	Ganesh Chaturthi	☐ Optional (RH)

+ Add a holiday

A restricted holiday is optional — employees choose a limited number from the list rather than the whole company taking the day off.

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Save and continue

The suggested holiday list for the year — remove what does not apply, add what does.

Mark any optional holidays as **restricted**. Employees then apply for the one they want, and the request goes through approval like a leave application.

Step 6 – People

 **Brightpath Consulting**
Setting up your HR portal

STEP 1
Company

STEP 2
Structure

STEP 3
Leave

STEP 4
Shifts

STEP 5
Holidays

STEP 6
People

STEP 7
Finish

Add your employees

Add your team. Nobody is emailed yet — you choose when to send the invitations on the last step.

Add one at a timeImport a CSV

First name *

Last name

Work email *

Employee code

Joining date *

Portal access *

Department

Designation

Location

Add employee

ADDED SO FAR

4 employees

CODE	NAME	WORK EMAIL	DEPARTMENT	JOINED
BP0004	 Gaurav Shetty	gaurav.shetty@brightpath-demo.example	Consulting	01 Sep 2026
BP0003	 Ayesha Khan	ayasha.khan@brightpath-demo.example	Consulting	01 Sep 2026
BP0002	 Rajesh Menon	rajesh.menon@brightpath-demo.example	Consulting	01 Sep 2026
BP0001	 Sunita Bhatt	founder@brightpath-demo.example	Consulting	01 Sep 2026

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Continue

Add people one at a time, or upload a CSV. Nobody is emailed yet.

Add your employees here or import them from a spreadsheet. Everyone you add is created with a **pending invitation** that has *not* been sent — sending is a deliberate separate action, so you can build the register quietly and go live when you are ready.

Step 7 — Finish

 **Brightpath Consulting**
Setting up your HR portal

STEP 1
Company

STEP 2
Structure

STEP 3
Leave

STEP 4
Shifts

STEP 5
Holidays

STEP 6
People

STEP 7
Finish

You are ready to go

Everything is configured. Here is what we set up for Brightpath Consulting.

 **DEPARTMENTS 3**

 **DESIGNATIONS 4**

 **LOCATIONS 2**

 **LEAVE TYPES 3**

 **HOLIDAYS 8**

 **EMPLOYEES 4**

ONE LAST THING

3 employees have been added but not yet notified. Sending the welcome email invites them to set a password and sign in to their portal.

☒ **Send welcome emails now**
We will email all 3 pending invitations straight away. Untick this to send them later from the Employees screen.

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✓ Finish setup

What happens next? Your portal goes live immediately. Everything you set here — company details, leave policies, holidays, modules and email templates — stays editable from **Administration** in the sidebar.

A summary of what was configured, and the choice of whether to send invitations now.

Review the counts. Leave **Send welcome emails now** ticked to invite everyone immediately, or untick it and send them later from the Employees screen. Then choose **Finish setup** — your portal goes live at once.

5. Adding people

5.1 The employee register

XcodeFix HRMS
NORTHWIND TECHNOLOGIES

Home

To Do

Leave

Attendance

Helpdesk

Document Center

Expenses

Recruitment

My Interviews

Refer someone

Performance

Reviews

My Payslips

Tax statement

Tax declaration

Daily summary

Summary digest

Timesheet

Time review

Recognition

Engage

ADMINISTRATION

Company settings

Insights

Workforce

Employees

Movements

Exits

Departments

Designations

Grades

Locations

Shifts

Leave types & policies

Leave policies

Leave allocations

ADMINISTRATION EMPLOYEES

Employees

16 active - 18 matching this view

Send 1 invitation

Import

Add employee

Search

Department

Status

Apply

CODE	NAME	DEPARTMENT	DESIGNATION	LOCATION	JOINED	STATUS	PORTAL ACCESS		
NW1016	Aditya Verma	Engineering	Software Engineer	Bengaluru HQ	03 Jul 2026	Active	Employee	Open	Exit
NW1005	Ananya Krishnan	Engineering	Senior Software Engineer	Bengaluru HQ	03 Jul 2024	Active	Employee	Open	Exit
NW1002	Arjun Rao	Engineering	Chief Executive Officer	Bengaluru HQ	03 Jan 2023	Active	Organisation admin	Open	Exit
NW1008	Daniel Fernandes	Engineering	QA Engineer	Bengaluru HQ	03 Jan 2025	Active	Employee	Open	Exit
NW1007	Fatima Sheikh	Engineering	Software Engineer	Remote – India	03 Dec 2025	Active	Employee	Open	Exit
NW1012	Imran Qureshi	Sales & Marketing	Account Executive	Bengaluru HQ	03 Feb 2026	Active	Employee	Open	Exit
NW1018	Karan Malhotra	Sales & Marketing	Account Executive	Bengaluru HQ	03 Dec 2023	On notice	Employee	Open	Exit
NW1003	Kavita Menon	Engineering	Vice President – Engineering	Bengaluru HQ	03 Sep 2023	Active	Manager	Open	Exit
NW1013	Lakshmi Pillai	Customer Success	Customer Success Manager	Bengaluru HQ	03 Apr 2025	Active	Employee	Open	Exit
NW1001	Meera Iyer	People & Culture	HR Manager	Bengaluru HQ	03 Jul 2023	Active	Organisation admin	Open	Exit
NW1011	Neha Gupta	Sales & Marketing	Sales Manager	Bengaluru HQ	03 May 2024	Active	Manager	Open	Exit
NW1009	Priya Nair	Product & Design	Product Manager	Bengaluru HQ	03 Sep 2024	Active	Manager	Open	Exit
NW1017	Ritu Chauhan	Customer Success	Account Executive	Pune Development Centre	03 Apr 2026	On notice	Employee	Open	Exit
NW1004	Rohit Deshmukh	Engineering	Engineering Manager	Pune Development Centre	03 Mar 2024	Active	Manager	Open	Exit
NW1010	Sahil Kapoor	Product & Design	UX Designer	Remote – India	03 Oct 2025	Active	Employee	Open	Exit
NW1015	Sneha Joshi	Finance & Legal	Finance Manager	Bengaluru HQ	03 Nov 2024	Active	Employee	Open	Exit
NW1014	Tarun Bhatia	People & Culture	HR Executive	Bengaluru HQ	03 Sep 2025	Active	HR manager	Open	Exit
NW1006	Vikram Singh	Engineering	Software Engineer	Pune Development Centre	03 Jul 2025	Active	Employee	Open	Exit

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Administration → Employees. Search, filter by department and status, and see at a glance who has portal access.

The register lists everyone, current and past. The **Portal access** column shows each person's role, or that they have no login yet. The header shows how many invitations are still unsent — **Send N invitations** despatches all of them in one action.

5.2 Adding one person

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NORTHWIND TECHNOLOGIES

ADMINISTRATION EMPLOYEES ADD AN EMPLOYEE
Add an employee

Search people, tickets, documents... Quick Links Meera Iyer HR Manager

New employee
Add someone to the register

PERSONAL DETAILS

First name * Last name Work email * Personal email Phone

Used to sign in and to receive notifications.

Date of birth Gender * Marital status *

mm/dd/yyyy Prefer not to say Prefer not to say

EMPLOYMENT

Employee code Joining date * Employment type * Status * Probation ends

EMP0001 09/03/2026 Full time Active mm/dd/yyyy

Leave as-is to use the next code in sequence.

Exit date

mm/dd/yyyy

Only set once they have left.

PLACEMENT

Department Designation Grade Location Shift

Not set Not set Not set Not set Not set

Leave entitlement can be assigned by grade.

Holiday calendar Reports to

Organisation default Nobody

Their approver for leave and attendance.

PORTAL ACCESS

Role Email their invitation now

Employee

What they can do once they activate their account.

Cancel Add employee

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Adding an employee. Four sections: personal details, employment, placement, portal access.

1. **Personal details** — first and last name, work email, personal email, phone, date of birth, gender and marital status. Work email is the sign-in identity.
2. **Employment** — employee code (pre-filled with the next in sequence), joining date, employment type, status, probation end date. Leave exit date blank.
3. **Placement** — department, designation, location, shift, holiday calendar and, most importantly, **Reports to**. That person becomes the approver for this employee's leave and attendance corrections.
4. **Portal access** — pick the role, and decide whether to email the invitation immediately.

Set "Reports to" for everyone. It is the single field most often skipped, and it is the one that decides whether a leave request has an approver. People with no manager fall to HR by default, which is fine for a ten-person company and unmanageable at a hundred.

5.3 Importing a team from a spreadsheet

Import employees
Add many people at once from a spreadsheet

UPLOAD A CSV
Employee CSV file
Choose File | No file chosen

Up to 2 MB. Rows with problems are reported and skipped – everything valid still imports.

Expected columns – the first row must be the header:
emp_code, first_name, last_name, email, department, designation, location, join_date, manager_email
Only first_name and email are required. Departments, designations and locations are matched by name against what already exists. manager_email is resolved after every row is imported, so managers can appear anywhere in the file.

Import employees | Download a template

Imported people are added with a pending invitation but nobody is emailed yet. Use **Send invitations** on the employees screen when you are ready.

NAMES THAT WILL MATCH
Anything else in those columns is ignored, and the person is imported without it.

DEPARTMENTS
Customer Success | Engineering | Finance & Legal | People & Culture
Product & Design | Sales & Marketing

DESIGNATIONS
Account Executive | Chief Executive Officer | Customer Success Manager
Engineering Manager | Finance Manager | HR Executive | HR Manager
Product Manager | QA Engineer | Sales Manager
Senior Software Engineer | Software Engineer | UX Designer
Vice President – Engineering

LOCATIONS
Bengaluru HQ | Pune Development Centre | Remote – India

Administration → Employees → Import. A CSV of up to 2 MB.

The import expects a header row with these columns. Column order does not matter; capitalisation and spaces in the header are ignored.

COLUMN	REQUIRED	NOTES
first_name	Yes	
email	Yes	Must be a valid address, unique in the file and not already on the register
last_name	No	
emp_code	No	Left blank, the next code in sequence is allocated
join_date	No	Any recognisable date. Blank means today
department	No	Matched by name against your department list
designation	No	Matched by name
location	No	Matched by name
manager_email	No	The manager's work email; linked after all rows are created, so managers may appear anywhere in the file

A bad row never aborts the run. The file is parsed first, every problem is reported line by line, and everything valid still lands. Duplicates and rows with an invalid email are skipped and named in the result. As with the wizard, imported people are created with an **unset** invitation.

Import order tip. Create your departments, designations and locations first. The importer matches those columns by name, and anything it cannot match is simply left unset — which means a silent gap rather than an error.

5.4 Invitations and activation

PERSONAL DETAILS

First name * Ananya Last name Krishnan Work email * ananya.krishnan@northwind-demo.e Personal email ananya.krishnan@personalmail.esan Phone +91 9429929938

Date of birth 11/30/1992 Gender * Female Marital status * Single

EMPLOYMENT

Employee code NW1005 Joining date * 07/03/2024 Employment type * Full time Status * Active Probation ends 01/03/2025

Exit date mm/dd/yyyy

PLACEMENT

Department Engineering Designation Senior Software Engineer Grade Not set Location Bengaluru HQ Shift FLX - Flexible Shift

Holiday calendar India Holidays 2026 - 2026 Reports to Rohit Deshmukh - NW1004

INVITATION

This person already has a login. Sending a new invitation replaces any pending one and lets them set a new password.

Role to grant Employee Send invitation

MOVEMENTS

A promotion or transfer is dated. It becomes their placement on the effective date and stays in the history afterwards. Leave a field blank to keep what they have now.

EFFECTIVE	CHANGE	PLACEMENT	REASON
01 Jan 2026	Other change	Senior Software Engineer Engineering - Bengaluru HQ	Promotion

Kind of change * Promotion Effective from * 09/03/2026 New designation Unchanged New grade Unchanged New department Unchanged

New location Unchanged New shift Unchanged New manager Unchanged

Reason

Recorded in the history and the audit trail.

Record movement

LEAVING THE ORGANISATION

Marking someone as exited keeps their history intact and disables their login. Nothing is deleted.

Mark as exited

An existing employee record. Invitation and exit controls sit at the bottom.

An invitation is a single-use, time-limited link. The employee clicks it, sets their own password, and their account activates — you never see or set anyone's password. Re-sending an invitation replaces any pending one, which is also how you help someone who never received the first.

5.5 A new-joiner runbook

WHEN	DO THIS
Offer accepted	Collect the joining-form data listed in §2.6 and §2.7, and the documents in §2.8
A week before	Create the employee record with joining date, department, designation, location, shift and Reports to . Do not send the invitation yet
Day one, morning	Send the invitation. Upload their signed offer letter and personal documents to their My Documents folder
Day one	Ask them to complete My Information — address, emergency contact, family — and confirm their statutory details
First week	Record issued assets (laptop, phone, access card) on their record. Check their leave balances look right for a mid-year joiner
First month	Confirm attendance is being marked correctly for their shift; correct anything odd before the first payroll cut-off
Probation end	The HR home screen flags confirmations due in the next 30 days. Confirm them, or extend the probation date

6. Company and structure administration

6.1 Company settings

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ADMINISTRATION COMPANY SETTINGS
Company settings

Search people, tickets, documents... Quick Links M1 Meera Iyer HR Manager

Company settings

Profile, address and branding

Enterprise plan 18 employees

PROFILE

Company name *
Northwind Technologies

Registered legal name Industry Website Contact phone
Northwind Technologies Private Limit it_services https://www.northwind-demo.examp +91 80 4123 7700

Used on letters and statutory documents.

REGISTERED ADDRESS

Address line 1
Tower B, Prestige Tech Park

Address line 2
Marathahalli Outer Ring Road

City State PIN / postal code
Bengaluru Karnataka 560103

REGIONAL

Time zone * Country * Currency * Date format *
India (IST) India INR 03 Sep 2026 (d M Y)

Attendance, leave and reports are all read in this time zone.

BRANDING

Your logo and colour appear in the portal sidebar and at the top of every email your team receives.

Company logo
Choose File No file chosen

Brand colour
Used for buttons, highlights and email headers.

PNP, JPG, WEBP or SVG, up to 1 MB.

Your portal address is https://hrms.xcodefix.com/

Save settings

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Administration → Company settings. Profile, registered address, regional settings and branding.

Everything from wizard step 1, permanently editable. Changing the logo or brand colour updates the portal and future emails immediately; mail already sent is untouched.

6.2 Departments, designations, locations and shifts

XcodeFix HRMS
NORTHWIND TECHNOLOGIES

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To Do6

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Attendance

Helpdesk

Document Center

Expenses

Recruitment

My Interviews

Refer someone

Performance

Reviews

My Payslips

Tax statement

Tax declaration

Daily summary

Summary digest

Timesheet

Time review

Recognition

ADMINISTRATION DEPARTMENTS

Departments

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Departments

How the organisation is divided up

6 in total

DEPARTMENT	CODE	HEAD	PEOPLE	STATUS	
Customer Success	CS	Lakshmi Pillai	2	Active	EditDelete
Engineering	ENG	Kavita Menon	8	Active	EditDelete
Finance & Legal	FIN	Sneha Joshi	1	Active	EditDelete
People & Culture	HR	Meera Iyer	2	Active	EditDelete
Product & Design	PRD	Priya Nair	2	Active	EditDelete
Sales & Marketing	SLS	Neha Gupta	3	Active	EditDelete

ADD A DEPARTMENT

Department name *

Short code

Optional, for reports and exports.

Head of department

Not set

Active

+ Add department

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Departments, each with a code, a head and an active flag.

XcodeFix HRMS
NORTHWIND TECHNOLOGIES

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ADMINISTRATION DESIGNATIONS

Designations

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Designations

Job titles and their seniority

14 in total

DESIGNATION	LEVEL	PEOPLE	STATUS	
Chief Executive Officer	1	1	Active	EditDelete
Vice President – Engineering	2	1	Active	EditDelete
Engineering Manager	3	1	Active	EditDelete
Finance Manager	3	1	Active	EditDelete
HR Manager	3	1	Active	EditDelete
Sales Manager	3	1	Active	EditDelete
Customer Success Manager	4	1	Active	EditDelete
Product Manager	4	1	Active	EditDelete
Senior Software Engineer	4	1	Active	EditDelete
Account Executive	5	3	Active	EditDelete
HR Executive	5	1	Active	EditDelete
QA Engineer	5	1	Active	EditDelete
Software Engineer	5	3	Active	EditDelete
UX Designer	5	1	Active	EditDelete

ADD A DESIGNATION

Designation *

Level

Lower numbers sort first. Optional.

Active

+ Add designation

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Designations, with an optional seniority level.

XcodeFix HRMS
NORTHWIND TECHNOLOGIES

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Leave types & policies

Leave policies

Leave allocations

Blocked dates

Holiday calendars

ADMINISTRATION EMPLOYEE GRADES

Employee grades

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Employee grades

Seniority bands that leave entitlement can follow

6 in total

GRADE	CODE	LEVEL	PEOPLE	STATUS	
Executive Founders and C-level	EXE	1	1	Active	EditDelete
Senior Leadership VPs and heads of function	SL	2	1	Active	EditDelete
Manager People managers and team leads	MGR	3	3	Active	EditDelete
Senior Professional Senior individual contributors	SP	4	2	Active	EditDelete
Professional Individual contributors	PRO	5	8	Active	EditDelete
Associate Early career and interns	ASC	6	0	Active	EditDelete

ADD A GRADE

Grade name *

Short code

Optional, for reports and exports.

Level

Lower numbers are more senior. Optional.

Description

What this band covers.

☒ Active

+ Add grade

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Grades, the seniority bands leave entitlement can follow.

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NORTHWIND TECHNOLOGIES

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ADMINISTRATION LOCATIONS

Locations

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Locations

Offices and sites people are attached to

3 in total

LOCATION	CITY	COUNTRY	PEOPLE	STATUS	
Bengaluru HQ	Bengaluru	India	13	Active	EditDelete
Pune Development Centre	Pune	India	3	Active	EditDelete
Remote – India	—	India	2	Active	EditDelete

ADD A LOCATION

Location name *

Address

City

State

Country *

India

Time zone

Leave blank to use the company time zone.

☒ Active

+ Add location

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Locations, with address and time zone.

XcodeFix HRMS
NORTHWIND TECHNOLOGIES

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ADMINISTRATION SHIFTS
Shifts

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Shifts

Working hours, grace time and the weekly off

3 in total

CODE	SHIFT	TIMING	WEEK OFF	PEOPLE	STATUS	
GEN	General Shift Default	09:30-18:30	Sat, Sun	13	Active	Edit Delete
FLX	Flexible Shift	11:00-20:00	Sat, Sun	3	Active	Edit Delete
SUP	Support Shift (EMEA)	13:00-22:00	Sat, Sun	2	Active	Edit Delete

ADD A SHIFT

Shift code *

Shift name *

Start time *
 10:00 AM

End time *
 07:00 PM

Break minutes *
 60

Grace minutes *
 15

Weekly off

☐ Mon
☐ Tue
☐ Wed
☐ Thu
☐ Fri
☒ Sat
☒ Sun

Working hours per day are worked out from the timing and break.

☐ Use as the default shift for new employees

☒ Active

+ Add shift

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Shifts, with timings, break, grace and weekly offs. One shift is the organisation default.

Prefer **deactivating** to deleting. A deactivated entry stops appearing in dropdowns for new records but keeps the history of everyone already attached to it intact.

6.3 Movements: promotions and transfers

ADMINISTRATION MOVEMENTS
Movements

Search people, tickets, documents... Quick Links Meera Iyer HR Manager

Movements
Promotions, transfers and confirmations

1 Promotion - this year 0 Transfer - this year 0 Confirmation - this year 4 Other change - this year

HISTORY All movements

EMPLOYEE	CHANGE	EFFECTIVE	PLACEMENT	REASON
Aditya Verma NW1016	Promotion	01 Sep 2026	Senior Software Engineer Engineering - Senior Professional - Bengaluru HQ	Strong year; promoted at cycle close.
Aditya Verma NW1016	Other	13 Jun 2026 until 31 Aug 2026	Software Engineer Engineering - Professional - Bengaluru HQ	Placement on joining
Ritu Chauhan NW1017	Other	13 Mar 2026	Account Executive Customer Success - Professional - Pune Development Centre	Placement on joining
Lakshmi Pillai NW1013	Other	01 Feb 2026	Customer Success Manager Customer Success - Bengaluru HQ	Internal transfer
Imran Qureshi NW1012	Other	13 Jan 2026	Account Executive Sales & Marketing - Professional - Bengaluru HQ	Placement on joining
Ananya Krishnan NW1005	Other	01 Dec 2025	Senior Software Engineer Engineering - Bengaluru HQ	Promotion
Fatima Sheikh NW1007	Other	13 Nov 2025	Software Engineer Engineering - Professional - Remote — India	Placement on joining
Sahil Kapoor NW1010	Other	13 Sep 2025	UX Designer Product & Design - Professional - Remote — India	Placement on joining
Tarun Bhatia NW1014	Other	13 Aug 2025	HR Executive People & Culture - Professional - Bengaluru HQ	Placement on joining
Rohit Deshmukh NW1004	Other	01 Aug 2025	Engineering Manager Engineering - Bengaluru HQ	Promotion
Vikram Singh NW1006	Other	13 Jun 2025	Software Engineer Engineering - Professional - Pune Development Centre	Placement on joining
Daniel Fernandes NW1008	Other	13 Dec 2024	QA Engineer Engineering - Professional - Bengaluru HQ	Placement on joining
Sneha Joshi NW1015	Other	13 Oct 2024	Finance Manager Finance & Legal - Manager - Bengaluru HQ	Placement on joining
Priya Nair NW1009	Other	13 Aug 2024	Product Manager Product & Design - Senior Professional - Bengaluru HQ	Placement on joining
Neha Gupta NW1011	Other	13 Apr 2024	Sales Manager Sales & Marketing - Manager - Bengaluru HQ	Placement on joining
Karan Malhotra NW1018	Other	13 Nov 2023	Account Executive Sales & Marketing - Professional - Bengaluru HQ	Placement on joining
Kavita Menon NW1003	Other	13 Aug 2023	Vice President — Engineering Engineering - Senior Leadership - Bengaluru HQ	Placement on joining
Meera Iyer NW1001	Other	13 Jun 2023	HR Manager People & Culture - Manager - Bengaluru HQ	Placement on joining
Arjun Rao NW1002	Other	13 Dec 2022	Chief Executive Officer Engineering - Executive - Bengaluru HQ	Placement on joining

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Administration → Movements. Every promotion, transfer and confirmation, newest first.

A movement is recorded on the person's own record, under **Movements**, and appears here afterwards. Fill in only what changes — a blank field keeps what they have now.

PERSONAL DETAILS

First name * Ananya, Last name Krishnan, Work email * ananya.krishnan@northwind-demo.e, Personal email ananya.krishnan@personalmail.lexan, Phone +91 9429929938

Date of birth 11/30/1992, Gender * Female, Marital status * Single

EMPLOYMENT

Employee code NW1005, Joining date * 07/03/2024, Employment type * Full time, Status * Active, Probation ends 01/03/2025

Exit date mm/dd/yyyy

PLACEMENT

Department Engineering, Designation Senior Software Engineer, Grade Not set, Location Bengaluru HQ, Shift FLX - Flexible Shift

Holiday calendar India Holidays 2026 - 2026, Reports to Rohit Deshmukh - NW1004

MOVEMENTS

EFFECTIVE	CHANGE	PLACEMENT	REASON
01 Jan 2026	Other change	Senior Software Engineer Engineering - Bengaluru HQ	Promotion

Kind of change * Promotion, Effective from * 09/03/2026, New designation Unchanged, New grade Unchanged, New department Unchanged

New location Unchanged, New shift Unchanged, New manager Unchanged

Reason

LEAVING THE ORGANISATION

Marking someone as exited keeps their history intact and disables their login. Nothing is deleted.

Record movement, Mark as exited

The movement card sits below the employee's details, with their placement history above it.

FIELD	WHAT IT DOES
Kind of change	Promotion, transfer, confirmation or other — it is what the movement is filed under
Effective from	The date it takes effect. A future date is stored as scheduled and does <i>not</i> change the record until that morning
New designation, grade, department, location, shift, manager	Leave any of them blank to keep the current value
Reason	Kept in the history and the audit trail

Dating a movement forward is the point. Record the promotion when it is decided, dated for the first of next month, and it applies itself on the day. Nobody has to remember.

Editing an employee's placement directly on their record is treated as a correction to the current placement rather than a new movement, so the history does not fill up with edits.

6.4 Users and roles

The screenshot displays the 'Users & roles' section of the XcodeFix HRMS interface. The page title is 'ADMINISTRATION USERS & ROLES Users & roles'. A search bar is present at the top right. The main content is a table listing users with the following columns: USER, EMPLOYEE, DEPARTMENT, ACCOUNT, LAST SIGN-IN, and ROLE. The table contains 20 rows of user data. The 'ROLE' column for each user has a dropdown menu and a 'Save' button. A green badge at the top right indicates '2 administrators'. The user 'Meera Iyer (you)' is highlighted, and a message states 'Another administrator must change your role.'.

USER	EMPLOYEE	DEPARTMENT	ACCOUNT	LAST SIGN-IN	ROLE
AR Arjun Rao arjun.rao@northwind-demo.example	Arjun Rao NW1002	Engineering	Active	02 Sep 2026	Organisation admin Save
MI Meera Iyer (you) meera.ilyer@northwind-demo.example	Meera Iyer NW1001	People & Culture	Active	03 Sep 2026	Organisation admin Another administrator must change your role.
TB Tarun Bhatia tarun.bhatia@northwind-demo.example	Tarun Bhatia NW1014	People & Culture	Active	02 Sep 2026	HR manager Save
KM Kavita Menon kavita.menon@northwind-demo.example	Kavita Menon NW1003	Engineering	Active	02 Sep 2026	Manager Save
NG Neha Gupta neha.gupta@northwind-demo.example	Neha Gupta NW1011	Sales & Marketing	Active	02 Sep 2026	Manager Save
PN Priya Nair priya.nair@northwind-demo.example	Priya Nair NW1009	Product & Design	Active	02 Sep 2026	Manager Save
RD Rohit Deshmukh rohit.deshmukh@northwind-demo.example	Rohit Deshmukh NW1004	Engineering	Active	02 Sep 2026	Manager Save
AV Aditya Verma aditya.verma@northwind-demo.example	Aditya Verma NW1016	Engineering	Active	02 Sep 2026	Employee Save
AK Ananya Krishnan ananya.krishnan@northwind-demo.example	Ananya Krishnan NW1005	Engineering	Active	03 Sep 2026	Employee Save
DF Daniel Fernandes daniel.fernandes@northwind-demo.example	Daniel Fernandes NW1008	Engineering	Active	02 Sep 2026	Employee Save
FS Fatima Sheikh fatima.sheikh@northwind-demo.example	Fatima Sheikh NW1007	Engineering	Active	02 Sep 2026	Employee Save
IQ Imran Qureshi imran.qureshi@northwind-demo.example	Imran Qureshi NW1012	Sales & Marketing	Active	02 Sep 2026	Employee Save
KM Karan Malhotra karan.malhotra@northwind-demo.example	Karan Malhotra NW1018	Sales & Marketing	Active	02 Sep 2026	Employee Save
LP Lakshmi Pillai lakshmi.pillai@northwind-demo.example	Lakshmi Pillai NW1013	Customer Success	Active	02 Sep 2026	Employee Save
RC Ritu Chauhan ritu.chauhan@northwind-demo.example	Ritu Chauhan NW1017	Customer Success	Active	02 Sep 2026	Employee Save
SK Sahil Kapoor sahil.kapoor@northwind-demo.example	Sahil Kapoor NW1010	Product & Design	Active	02 Sep 2026	Employee Save
SJ Sneha Joshi sneha.joshi@northwind-demo.example	Sneha Joshi NW1015	Finance & Legal	Active	02 Sep 2026	Employee Save
VS Vikram Singh vikram.singh@northwind-demo.example	Vikram Singh NW1006	Engineering	Active	02 Sep 2026	Employee Save

Administration → Users & roles. One row per login, with the role changeable in place.

Change someone's role by picking a new one and choosing **Save** on that row. The count of administrators is shown at the top; you cannot change your own role, and the portal will not let you remove the last administrator.

6.5 Modules

Administration Modules

Modules

Switch off what your organisation does not use — it disappears from everyone's navigation

Enterprise plan

- Core HR** • Always on
Employee records, org structure, profiles and approvals.
- Approvals & To Do** • Always on
A single inbox for everything awaiting action.
- Leave** • On
Leave types, policies, balances, applications, calendars.
- Attendance** • On
Swipes, daily attendance, shifts and regularisation.
- Helpdesk** • On
Employee tickets with categories and assignment.
- Document Center** • On
Payslips, policies, forms and letter requests.
- Expenses** • On
Expense claims with receipts, approval and payment tracking.
- Engage** • On
Company feed: announcements, kudos and celebrations.
- Recruitment** • On
Job openings, an applicant pipeline, interviews and offers.
- Timesheets** • On
Weekly time recording against projects, with manager approval.
- Performance** • On
Appraisal cycles, goals, self and manager review, and peer feedback.
- Daily work summary** • On
A standing daily question to a group, with the answers collected into a digest.
- Payroll (preview)** • On
Salary structures, payroll runs and payslips. Statutory deductions are not included yet.
- Tax declarations (preview)** • On
Investment declarations, proof verification and org-entered tax slabs. No rates are supplied; PF, ESI, professional tax and Form 16 are not covered.
- Drivers & vehicles** • On
Driver licences with expiry tracking, and the vehicles they are assigned to.

Turning a module off hides its screens and stops its emails. Nothing already recorded is deleted.

Save modules

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Administration → **Modules**. Switch optional modules on and off for your company.

A module is usable when it is both entitled to your plan and enabled by you. Switching one off hides it from everybody instantly and hides its navigation entirely. Data is not deleted — switching it back on restores everything.

6.6 Audit trail

XcodeFix HRMS
NORTHWIND TECHNOLOGIES

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ADMINISTRATION

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Workforce

ADMINISTRATION AUDIT TRAIL

Audit trail

Search people, tickets, documents...

Quick Links

M1 Meera Iyer
HR Manager

Audit trail

Every change made inside your organisation, newest first

17 entries

WHEN	WHO	ACTION	RECORD	DETAIL
03 Sep 2026 12:18	Meera Iyer meera.iyer@northwind-demo.example	auth.login	user #456	meera.iyer@northwind-demo.example
03 Sep 2026 12:15	Ananya Krishnan ananya.krishnan@northwind-demo.example	auth.login	user #460	ananya.krishnan@northwind-demo.example
03 Sep 2026 12:15	Meera Iyer meera.iyer@northwind-demo.example	auth.login	user #456	meera.iyer@northwind-demo.example
03 Sep 2026 12:14	Ananya Krishnan ananya.krishnan@northwind-demo.example	auth.login	user #460	ananya.krishnan@northwind-demo.example
03 Sep 2026 12:14	Meera Iyer meera.iyer@northwind-demo.example	auth.login	user #456	meera.iyer@northwind-demo.example
31 Aug 2026 16:00	Meera Iyer meera.iyer@northwind-demo.example	employee.updated	employee #745	Status changed to On notice; exit date recorded ▶ What changed
29 Aug 2026 10:00	Tarun Bhatia tarun.bhatia@northwind-demo.example	letter.decided	letter_request	Issued experience letter for Ananya Krishnan ▶ What changed
25 Aug 2026 15:00	Meera Iyer meera.iyer@northwind-demo.example	email_template.updated	email_template	Customised template: leave.approved ▶ What changed
20 Aug 2026 15:00	Tarun Bhatia tarun.bhatia@northwind-demo.example	document.uploaded	document	Uploaded Employee Handbook 2026 to Company Policies ▶ What changed
13 Aug 2026 13:00	Meera Iyer meera.iyer@northwind-demo.example	role.changed	user	Tarun Bhatia granted the HR manager role ▶ What changed
10 Aug 2026 17:00	Tarun Bhatia tarun.bhatia@northwind-demo.example	employee.updated	employee #732	Changed designation to Senior Software Engineer ▶ What changed
04 Aug 2026 16:00	Meera Iyer meera.iyer@northwind-demo.example	module.enabled	module	Enabled module: Engage ▶ What changed
30 Jul 2026 16:00	Meera Iyer meera.iyer@northwind-demo.example	org.settings.updated	org	Updated company address and brand colour ▶ What changed
18 Jul 2026 18:00	Tarun Bhatia tarun.bhatia@northwind-demo.example	holiday_list.updated	holiday_list	Added Deepavali to India Holidays 2026 ▶ What changed
13 Jul 2026 10:00	Meera Iyer meera.iyer@northwind-demo.example	leave_type.updated	leave_type	Privilege Leave quota changed from 15 to 18 days ▶ What changed
05 Jul 2026 18:00	Meera Iyer meera.iyer@northwind-demo.example	employee.created	employee #743	Added employee Aditya Verma (NW1016) ▶ What changed
05 Jul 2026 10:00	Meera Iyer meera.iyer@northwind-demo.example	employee.invited	employee #743	Invitation sent to aditya.verma@northwind-demo.example ▶ What changed

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Administration → Audit trail. Every administrative change, with who, what and when.

Administrative actions are recorded here permanently — role changes, policy edits, employee updates, document uploads, letter decisions. If a support engineer ever signs in as your organisation, that is recorded too, along with the real person behind the session. Credentials are never written to the trail.

7. Leave administration

7.1 Leave types and policies

The screenshot displays the 'Leave types & policies' section of the XcodeFix HRMS interface. The left sidebar contains navigation links for Home, To Do, Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, My Interviews, Refer someone, Performance, Reviews, My Payslips, Tax statement, Tax declaration, Daily summary, Summary digest, Timesheet, Time review, Recognition, Engage, Company settings, and Insights. The main content area is titled 'Leave types & policies' and includes a sub-header 'What can be applied for, and the rules the request is checked against'. It features a table of published leave types and a form to add a new leave type.

CODE	NAME	QUOTA	ACCRUAL	CARRY CAP	NOTICE	STATUS	
PL	Privilege Leave	18	Monthly	12	3	Active	Edit Retire
SL	Sick Leave	12	Yearly	0	0	Active	Edit Retire
CL	Casual Leave	8	Yearly	0	1	Active	Edit Retire
ML	Maternity Leave	182	None	0	30	Active	Edit Retire
CO	Comp Off	0	None	0	0	Active	Edit Retire
LOP	Loss Of Pay • Unpaid	0	None	0	0	Active	Edit Retire

ADD A LEAVE TYPE

Code *

Name *

Short identifier, e.g. PL or SL.

Annual quota (days) *

Accrual *

Carry-forward cap (days)

Encashment cap (days per year)

Zero means no limit beyond the balance itself.

Notice required (days)

Minimum service (months)

Maximum consecutive days

Applies to *

Calendar colour

Hex value such as #0D9488.

☒ Paid leave

☒ Half days allowed

☐ Expect a supporting document

☐ Credit comp off to this type

☐ May be cashed in

☐ Allow a negative balance

☒ Available to employees

Administration → Leave types & policies. What can be applied for, and the rules behind it.

Each type carries its policy: annual quota, accrual frequency, carry-forward cap, minimum service, maximum consecutive days, notice days, whether negative balances are allowed, and any gender restriction. The rules are enforced when an employee applies, and the reasoning is shown to them on the apply screen — so a rejected application is rarely a surprise.

Accrual runs on the 1st of each month, and carry-forward is applied in January. Changing a quota mid-year affects future accrual; it does not retroactively rewrite balances already granted.

7.2 Entitlement bands and allocations

The quota on a leave type applies to everybody. When seniority earns more, a **leave policy** grants the extra days on top, and an **allocation** decides who gets it.

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ADMINISTRATION LEAVE POLICIES

Leave policies

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Leave policies

Entitlement bands you can grant to a grade or a person

Leave types

Allocations

A policy grants days **on top of** the organisation's own quota for each leave type. Use it when a band earns extra — a policy of 24 privilege days adds 24 to what the type already gives.

POLICY	LEAVE TYPES	TOTAL DAYS	GRANTED	STATUS
Senior Leadership Band VPs and heads of function	3	44	1	Active Edit Delete

ADD A POLICY

Policy name *

e.g. Senior Leadership

Description

DAYS PER YEAR

Leave a type blank to grant none of it under this policy.

Privilege Leave PL

0

Sick Leave SL

0

Casual Leave CL

0

Maternity Leave ML

0

Comp Off CO

0

Loss Of Pay LOP

0

☒ Active

Create policy

Administration → Leave policies. A band is a name and a number of days per leave type.

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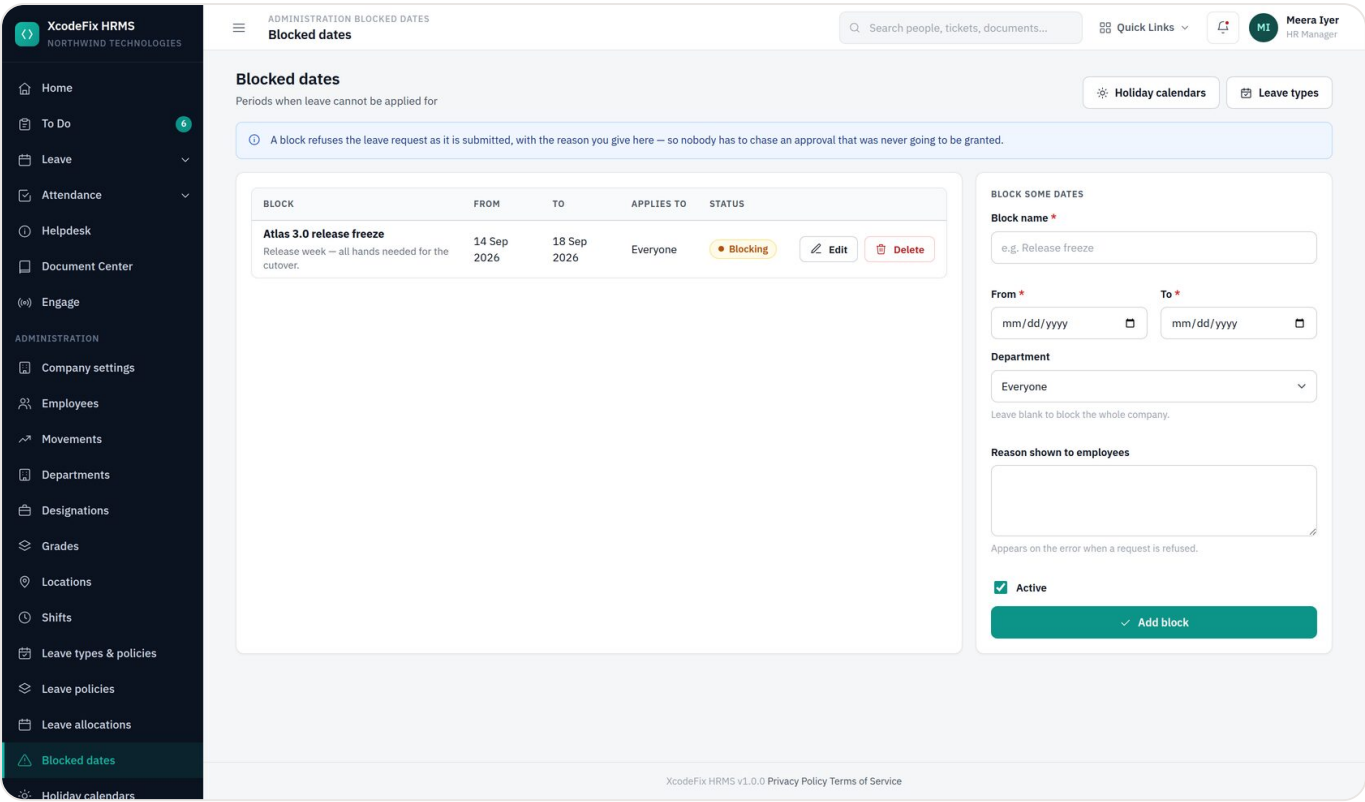
Administration → Leave allocations. Prepare first, check who it covers, then apply.

1. Create a **leave period** — the year entitlement is granted for. Periods may not overlap.
2. Create a **policy** with the days each leave type is worth under that band.
3. **Prepare an allocation**: choose the policy, the period, and whether it covers everyone, a grade, or one person. Tick pro-rating so a mid-year joiner earns a share rather than the lot.
4. Review the draft, then **Apply**. The days are written into every covered person's balance.

Applying is the irreversible half. Granted days land in the ledger and are not undone by deleting the allocation — correct them with a balance adjustment instead. Re-applying the same allocation never grants twice, so a half-finished run is safe to repeat.

Exited employees are never included, whichever target you choose.

7.3 Blocking dates



Administration → Blocked dates. A release freeze, a stock count, year end.

A block refuses the leave request as it is submitted, quoting the reason you wrote — so nobody chases an approval that was never going to be granted. Scope it to one department, or leave it blank for the whole company.

7.4 Balances across the organisation

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Leave balances

Entitlements across the organisation for 2026

2026

All leave types

Filter

BALANCES - 2026

EMPLOYEE	LEAVE TYPE	GRANTED	CARRIED	ADJUST	CONSUMED	PENDING	AVAILABLE
Aditya Verma	Privilege Leave	13.5	0	0	0	0	13.5
Aditya Verma	Sick Leave	12	0	0	0	0	12
Aditya Verma	Casual Leave	8	0	0	1	0	7
Aditya Verma	Comp Off	0	0	0	0	0	0
Aditya Verma	Loss Of Pay	0	0	0	0	0	0
Ananya Krishnan	Privilege Leave	13.5	6	0	0	5	14.5
Ananya Krishnan	Sick Leave	12	0	0	2	0	10
Ananya Krishnan	Casual Leave	8	0	0	0	0	8
Ananya Krishnan	Maternity Leave	182	0	0	0	0	182
Ananya Krishnan	Comp Off	0	0	0	0	0	0
Ananya Krishnan	Loss Of Pay	0	0	0	0	0	0
Arjun Rao	Privilege Leave	13.5	6	0	0	0	19.5
Arjun Rao	Sick Leave	12	0	0	0	0	12
Arjun Rao	Casual Leave	8	0	0	0	0	8
Arjun Rao	Comp Off	0	0	0	0	0	0
Arjun Rao	Loss Of Pay	0	0	0	0	0	0
Daniel Fernandes	Privilege Leave	13.5	6	0	0	0	19.5
Daniel Fernandes	Sick Leave	12	0	0	0	0	12
Daniel Fernandes	Casual Leave	8	0	0	1	0	7
Daniel Fernandes	Comp Off	0	0	0	0	0	0
Daniel Fernandes	Loss Of Pay	0	0	0	0	0	0
Fatima Sheikh	Privilege Leave	13.5	6	0	0	0	19.5
Fatima Sheikh	Sick Leave	12	0	0	0	0	12
Fatima Sheikh	Casual Leave	8	0	0	0	1	7
Fatima Sheikh	Maternity Leave	182	0	0	0	0	182
Fatima Sheikh	Comp Off	0	0	0	0	0	0
Fatima Sheikh	Loss Of Pay	0	0	0	0	0	0
Ishan Qureshi	Privilege Leave	13.5	0	0	0	0	13.5
Ishan Qureshi	Sick Leave	12	0	0	0	0	12
Ishan Qureshi	Casual Leave	8	0	0	0	0.5	7.5
Ishan Qureshi	Comp Off	0	0	0	0	0	0
Ishan Qureshi	Loss Of Pay	0	0	0	0	0	0
Karan Malhotra	Privilege Leave	13.5	6	0	0	0	19.5
Karan Malhotra	Sick Leave	12	0	0	0	0	12
Karan Malhotra	Casual Leave	8	0	0	0	0	8
Karan Malhotra	Comp Off	0	0	0	0	0	0
Karan Malhotra	Loss Of Pay	0	0	0	0	0	0
Kavita Menon	Privilege Leave	13.5	6	0	0	0	19.5
Kavita Menon	Sick Leave	12	0	0	0	0	12
Kavita Menon	Casual Leave	8	0	0	0	0	8
Kavita Menon	Maternity Leave	182	0	0	0	0	182
Kavita Menon	Comp Off	0	0	0	0	0	0
Kavita Menon	Loss Of Pay	0	0	0	0	0	0
Lakshmi Pillai	Privilege Leave	13.5	6	0	3	0	14.5
Lakshmi Pillai	Sick Leave	12	0	0	0	0	12
Lakshmi Pillai	Casual Leave	8	0	0	0	0	8
Lakshmi Pillai	Maternity Leave	182	0	0	0	0	182
Lakshmi Pillai	Comp Off	0	0	0	0	0	0
Lakshmi Pillai	Loss Of Pay	0	0	0	0	0	0
Neeru Iyer	Privilege Leave	13.5	6	0	0	0	19.5

Showing 6 - 50 of 89

1

2

3

ADJUST A BALANCE

Every adjustment is written to the ledger with your name against it.

Employee *

Choose an employee

Leave type *

Choose a leave type

Year *

2026

Adjustment (days) *

Reason *

negative numbers take days away

Apply adjustment

Administration → Leave balances. Every employee's entitlement for the year, in one grid.

Use this to sanity-check a policy change, to answer "how much do I have left?" without opening a record, and to make manual adjustments where a balance needs correcting. Adjustments are written to the same ledger as accruals and consumption, so the arithmetic always reconciles.

7.5 Holiday calendars

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ADMINISTRATION HOLIDAY CALENDARS

Holiday calendars

1 list(s) published for 2026

2026ShowLeave types

HOLIDAY LISTS

India Holidays 2026

2026 - 13 date(s)

NEW LIST

List name*

For example "India - Tamil Nadu".

Year*

2026

☐ Use as the default list for this year

+ Create list

INDIA HOLIDAYS 2026 - 2026

13 date(s)

Date*

mm/dd/yyyy

Holiday name*

TYPE

☐ Restricted holiday (RH)

+ Add holiday

DATE	DAY	HOLIDAY	TYPE	
01 Jan 2026	Thursday	New Year's Day	General	Remove
26 Jan 2026	Monday	Republic Day	General	Remove
04 Mar 2026	Wednesday	Holi	General	Remove
21 Mar 2026	Saturday	Id-ul-Fitr	Restricted	Remove
14 Apr 2026	Tuesday	Dr. Ambedkar Jayanti	Restricted	Remove
01 May 2026	Friday	Labour Day	General	Remove
15 Aug 2026	Saturday	Independence Day	General	Remove
05 Sep 2026	Saturday	Ganesh Chaturthi	General	Remove
02 Oct 2026	Friday	Gandhi Jayanti	General	Remove
20 Oct 2026	Tuesday	Dussehra	General	Remove
08 Nov 2026	Sunday	Deepavali	General	Remove
24 Nov 2026	Tuesday	Guru Nanak Jayanti	Restricted	Remove
25 Dec 2026	Friday	Christmas Day	General	Remove

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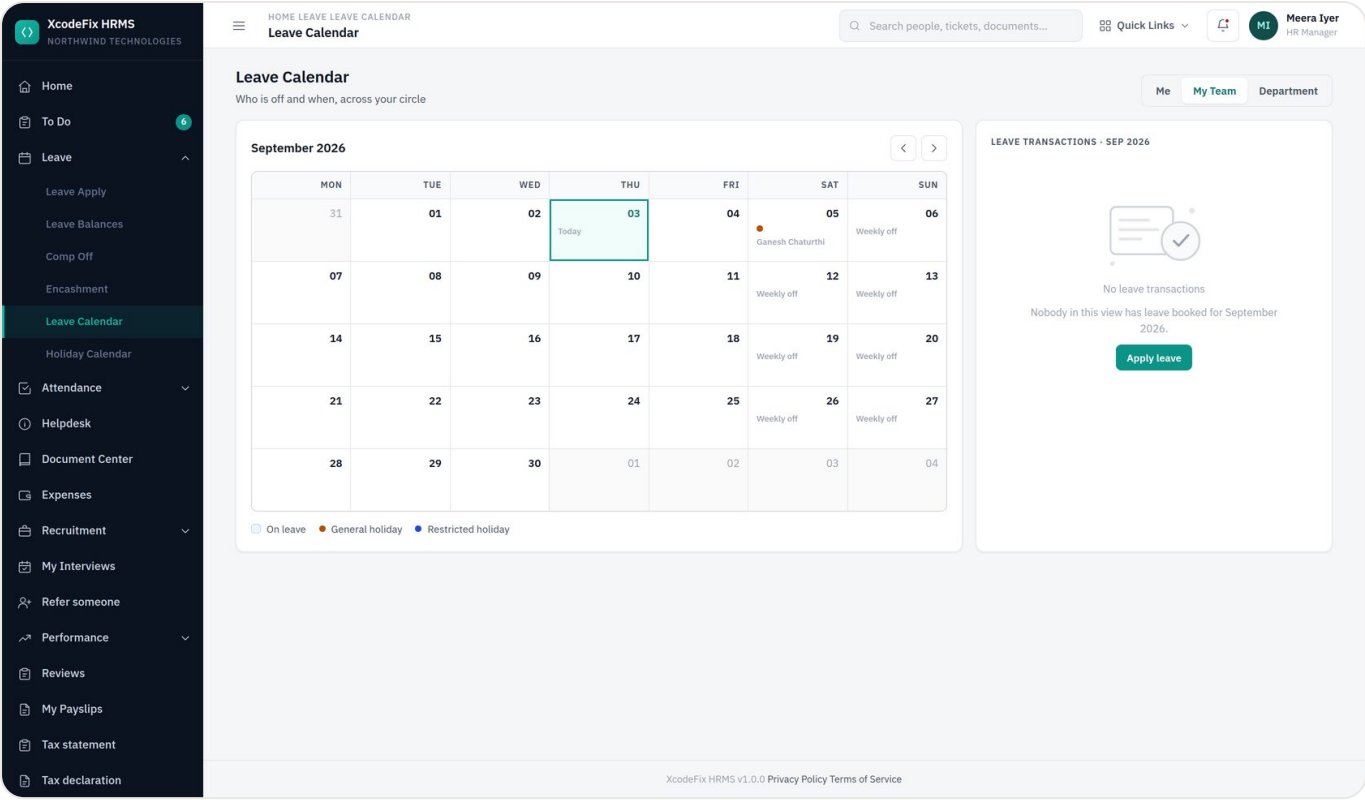
Privacy Policy

Terms of Service

Administration → Holiday calendars. Published lists and their dates.

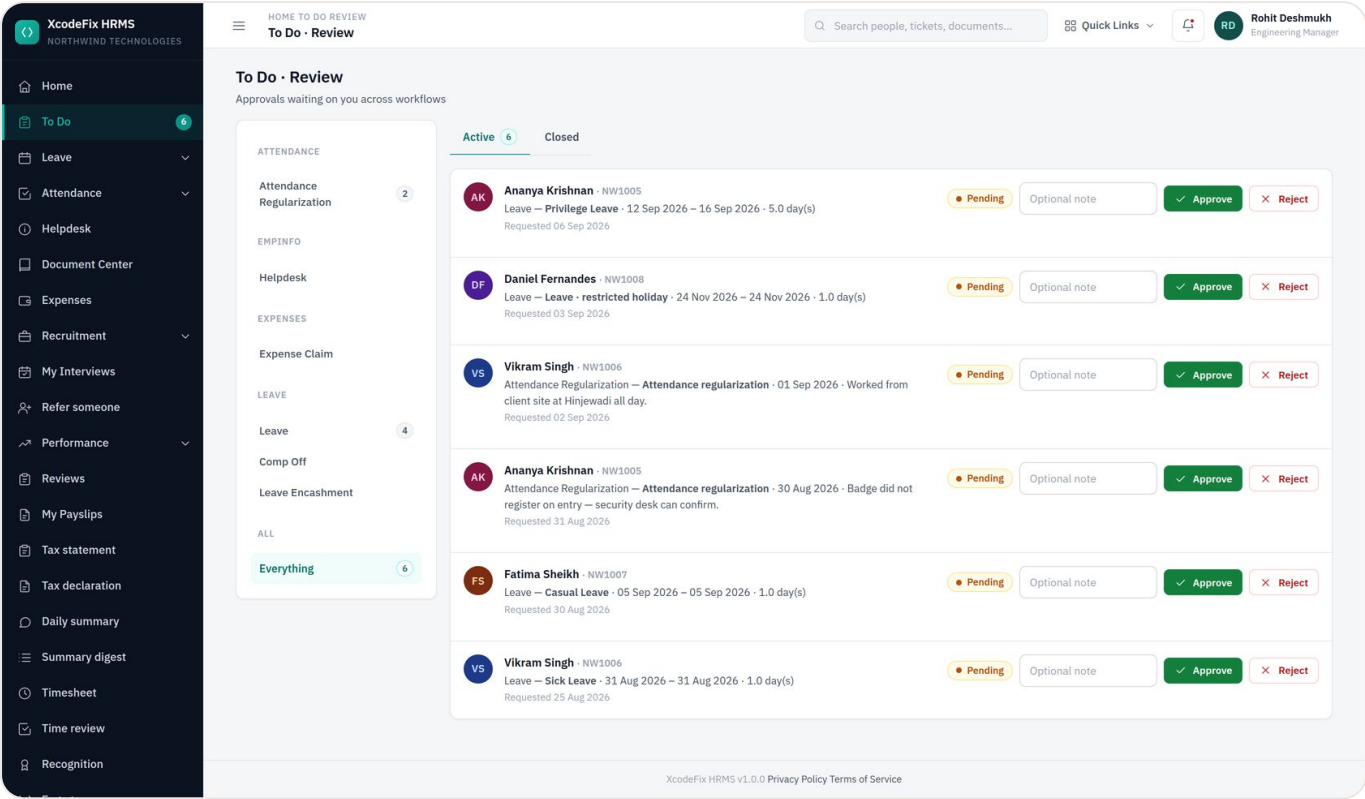
Create one calendar per year, or several if offices differ. Mark optional days as **restricted**. Employees see their own calendar under Leave → Holiday Calendar, and attendance marks those days as holidays automatically.

7.6 The leave calendar



Who is off and when. Employees see their own circle; HR sees the organisation.

7.7 Approving leave



A manager's To Do inbox: leave applications and attendance corrections from their reports.

Leave goes to the applicant's manager — the person named in **Reports to**. Approve or reject directly from the inbox, with an optional note that is emailed to the employee. Both outcomes notify the employee and update their balance immediately: an approval converts pending days to consumed, a rejection releases them.

7.8 Comp off and encashment

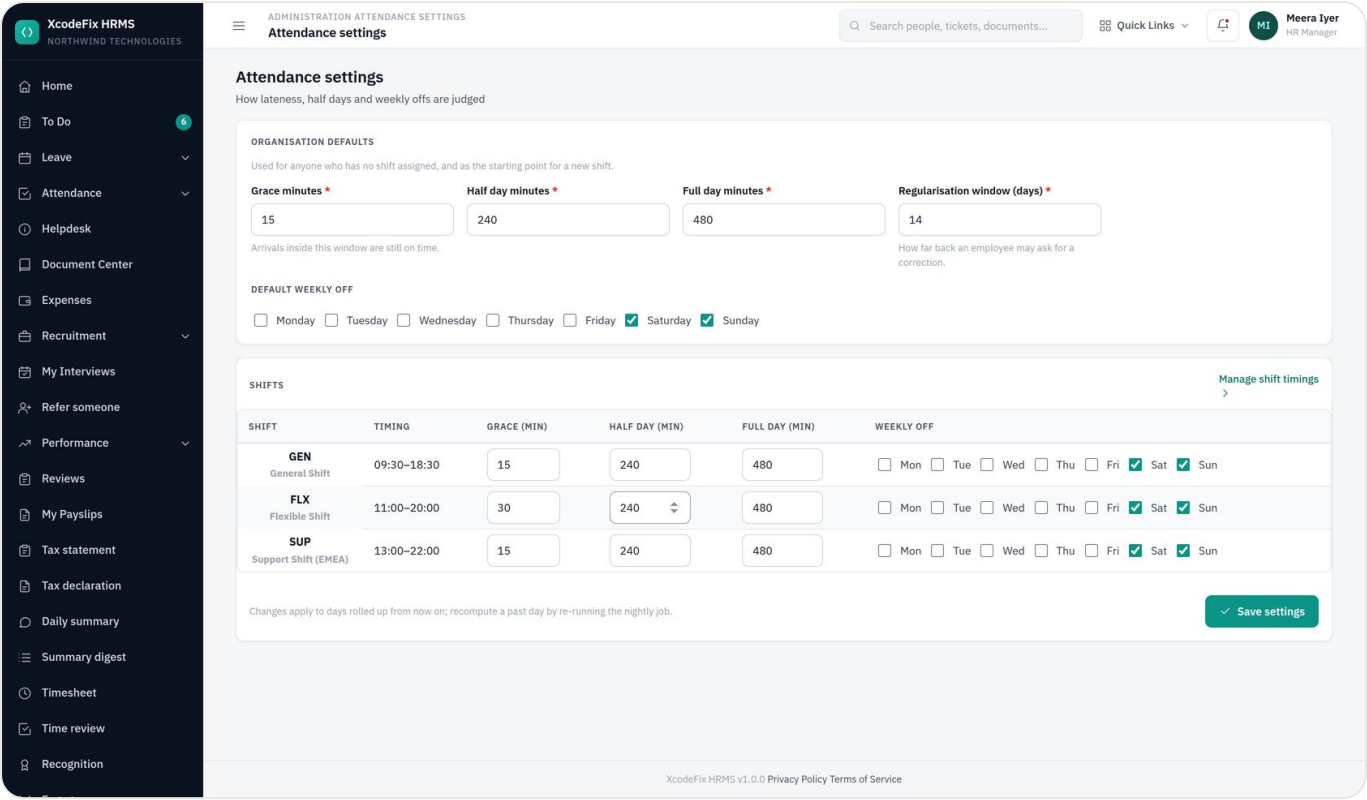
Two things employees ask for that create or spend entitlement, both landing in the approver's **To Do** inbox alongside leave.

REQUEST	WHAT APPROVING IT DOES	SWITCHED ON BY
Comp off	Credits the worked day to the employee's comp off balance	Ticking Credit comp off to this type on a leave type
Encashment	Spends the days and hands the amount to payroll to pay	Ticking May be cashed in , plus an optional yearly cap

Encashment is re-checked when you approve it, not only when it is asked for. If the employee has taken leave in the meantime and no longer has the days, the approval is refused rather than pushing the balance negative.

What the days are worth is not calculated here — the portal has no payroll. You record the amount to pay when approving, and it is carried on the record for payroll to act on.

8. Attendance administration



Administration → Attendance settings. Organisation defaults, then per-shift overrides.

Four numbers do most of the work:

SETTING	MEANING
Grace minutes	Arrivals inside this window still count as on time
Half-day minutes	Work below this is not a half day; at or above it, the day is marked half day
Full-day minutes	Work at or above this marks a full present day
Regularisation window	How many days back an employee may request a correction

Each shift can override grace and the two thresholds, and carries its own weekly offs. Changes apply to days rolled up from that point on — a day already processed keeps the judgement it was given, unless the nightly job is re-run for it.

How a day gets marked

Employees sign in and out from the portal. Overnight, the system rolls up each person's swipes against their shift and marks the day **Present**, **Half day**, **Absent**, **Weekly off**, **Holiday** or **On leave**, and computes late minutes, shortfall and excess. Approved leave wins over the swipe record, so an approved day never shows as absent.

Regularisation

When a day is wrong — a missed swipe, a client visit, a kiosk outage — the employee requests a correction from their attendance screen. It reaches their manager's To Do inbox with the requested times and a reason. Approving it rewrites that day and marks it regularised, which stays visible in the record.

9. Helpdesk administration

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ADMINISTRATION HELPDESK CATEGORIES

Helpdesk categories

Search people, tickets, documents...

Quick Links

M1Meera Iyer
HR Manager

Helpdesk categories

Each category routes new tickets to a default owner

+ New category

NAME	DEFAULT ASSIGNEE	RESPONSE TARGET	TICKETS	STATUS		
IT Support Laptops, access, VPN, software licences.	Daniel Fernandes	8 hrs	3	Active	Edit	Delete
HR & Policy Policy questions, letters, personal record changes.	Tarun Bhatia	24 hrs	2	Active	Edit	Delete
Payroll & Salary Payslips, reimbursements, tax declarations.	Sneha Joshi	24 hrs	1	Active	Edit	Delete
Facilities Seating, access cards, office maintenance.	Tarun Bhatia	48 hrs	1	Active	Edit	Delete
Leave & Attendance Balance corrections, regularisation help.	Tarun Bhatia	12 hrs	1	Active	Edit	Delete

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Administration → Helpdesk categories. Queues, their default owner and the response target.

Each category is a queue: a name, a description employees see when choosing, a **default assignee** who picks tickets up, and an **SLA in hours** that sets the response target. A workable starting set:

CATEGORY	OWNER	SLA
IT Support	IT lead	8 hours
HR & Policy	HR executive	24 hours
Payroll & Salary	Finance	24 hours
Facilities	Admin	48 hours
Leave & Attendance	HR executive	12 hours

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Ananya Krishnan
NW1005 - Bengaluru HQ

HELPDESK TKT-1041
Ticket TKT-1041

Search people, tickets, documents...
Quick Links
Ananya Krishnan
Senior Software Engineer

#TKT-1041 · VPN disconnects every few minutes
Raised 01 Sep 2026 by Ananya Krishnan · NW1005

In progress

Ananya Krishnan · 01 Sep 2026 11:00
Since the client update on Monday the VPN drops roughly every 10 minutes. Reinstalling the client did not help. Windows 11, office network and home network both affected.

Daniel Fernandes · 02 Sep 2026 11:00
Picked this up. Reproduced the issue on a spare machine — escalating to the network vendor and will update by tomorrow.

Daniel Fernandes · 02 Sep 2026 11:05
Status changed to in progress.

Ananya Krishnan · 03 Sep 2026 12:13
Thanks — it also happens on the guest Wi-Fi, so it does not look network specific. Happy to hand the laptop over for a look tomorrow morning.

Add a reply

Your reply is visible to the helpdesk team.
Post reply

DETAILS

Category: IT Support
Priority: High
Assignee: Daniel Fernandes
Raised by: Ananya Krishnan
Last activity: 02 Sep 2026 11:00
Response target: 8 hrs

A ticket thread. Comments, status changes and assignment are all recorded in order.

Tickets move through **Open** → **In progress** → **Resolved** → **Closed**. Every change emails the raiser. Internal notes are available for anything the employee should not see.

10. Documents and letters

10.1 Folders and documents

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HOME DOCUMENTS & FOLDERS

Documents & folders

Documents & folders

Everything filed for the organisation, and who can see it

UPLOAD A DOCUMENT

Folder *
My Documents

Visible to
Everyone in the organisation

Title
Choose a person to keep the file private to. Defaults to the file name.

Tag

File *
Choose File No file chosen

PDF, Office documents and images up to 10 MB.

Upload

FOLDERS

My Documents
5 files · Per employee

Payslips
54 files · Per employee

Form 16
10 files · Per employee

Company Policies
4 files · Org-wide

Forms & Templates
4 files · Org-wide

New folder *
Type *
Custom

Visibility *
Org-wide

Create folder

FILED DOCUMENTS

FILE	FOLDER	BELONGS TO	SIZE	UPLOADED		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Karan Malhotra	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Ritu Chauhan	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Aditya Verma	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Sneha Joshi	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Tarun Bhatia	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Lakshmi Pillai	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Imran Qureshi	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Neha Gupta	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Sahil Kapoor	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Priya Nair	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Daniel Fernandes	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Fatima Shaikh	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Vikram Singh	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Ananya Krishnan	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Rohit Deshmukh	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Kavita Menon	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Arun Rao	1 KB	28 Aug 2026		
Payslip – August 2026 payslip-2026-08.pdf	Payslips	Meera Iyer	1 KB	28 Aug 2026		
Employee Handbook 2026 employee-handbook-2026.pdf	Company Policies	Everyone	1 KB	04 Aug 2026		
Payslip – July 2026 payslip-2026-07.pdf	Payslips	Karan Malhotra	1 KB	28 Jul 2026		
Payslip – July 2026 payslip-2026-07.pdf	Payslips	Ritu Chauhan	1 KB	28 Jul 2026		
Payslip – July 2026 payslip-2026-07.pdf	Payslips	Aditya Verma	1 KB	28 Jul 2026		
Payslip – July 2026 payslip-2026-07.pdf	Payslips	Sneha Joshi	1 KB	28 Jul 2026		
Payslip – July 2026 payslip-2026-07.pdf	Payslips	Tarun Bhatia	1 KB	28 Jul 2026		
Payslip – July 2026 payslip-2026-07.pdf	Payslips	Lakshmi Pillai	1 KB	28 Jul 2026		

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Administration → Documents & folders. Company-wide folders and personal ones.

A folder is either **organisation-visible** — everyone sees the same files — or **employee-visible**, where each person sees only their own. Payslips, Form 16 and My Documents are the employee-visible kind; Company Policies and Forms are organisation-wide.

Uploads are content-checked rather than trusted by filename, stored outside the web root under a random name, and served only to people entitled to them. A file whose contents do not match its extension is rejected.

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10.2 Letter requests

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HOME LETTER REQUESTS
Letter requests

Search people, tickets, documents... Quick Links

Letter requests
Employment, address and experience letters raised by employees

Pending 3 Closed 1 Rejected 1

FS	Fatima Sheikh - NW1007 Address proof - Software Engineer - Bank KYC update. Requested 01 Sep 2026	Pending	Optional note	Mark ready	Reject
VS	Vikram Singh - NW1006 Employment letter - Software Engineer - Required for a rental agreement — please address it to the landlord. Requested 21 Aug 2026	Pending	Optional note	Mark ready	Reject
IQ	Imran Qureshi - NW1012 Salary certificate - Account Executive - Home loan application with HDFC. Requested 15 Aug 2026	Pending	Optional note	Mark ready	Reject

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Administration → **Letter requests**. Employment, experience, salary, address-proof and visa letters.

Employees request a letter from their Document Center; the request lands in your To Do inbox with their note explaining what it is for. Issue the letter by uploading the signed PDF against the request, which files it into that employee's documents and notifies them. Rejecting it asks for a reason, which is emailed too.

11. Expenses

People spend their own money on the company's behalf and want it back without chasing anyone. A claim is a cover sheet with a line per receipt: the employee builds it as a draft, submits it when it is complete, an approver decides, and finance records the payment.

11.1 Expense types

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ADMINISTRATIONEXPENSE TYPES

Expense types

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Expense types

What people may claim for, and any per-line cap

TYPE	PER-LINE CAP	RECEIPT	STATUS	
Travel Flights, trains, taxis and mileage	None	Required	Active	EditDelete
Accommodation Hotels while travelling for work	8,000.00	Required	Active	EditDelete
Meals Meals while travelling or working late	1,500.00	Optional	Active	EditDelete
Telephone & Internet Monthly reimbursement of work usage	2,000.00	Required	Active	EditDelete
Client Entertainment Meals and events with customers	10,000.00	Required	Active	EditDelete
Office Supplies Small purchases for the team	3,000.00	Optional	Active	EditDelete

ADD A TYPE

Type name *
e.g. Travel

Description

Per-line cap
0
Zero means no cap.

Sort order
0

☐ A receipt is required

☒ Active

Add type

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Administration → Expense types. What may be claimed, and the rules that go with it.

SETTING	WHAT IT DOES
Per-line cap	The most one line of this type may be worth. The claim is refused at the point the line is added, not at approval. Zero means no cap
Receipt required	A line of this type cannot be added without a file attached
Sort order, active	Ordering in the picker, and whether it still appears for new claims

A type that has been used on a claim cannot be deleted — switch it off instead, and the history stays readable.

11.2 The claims register

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ADMINISTRATIONEXPENSE CLAIMS

Expense claims

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Expense claims

Everything submitted, and what is still to pay

Expense types

0.00

Awaiting approval - 0 claim(s)

0.00

Approved, unpaid - 0 claim(s)

1,200.00

Paid - 1 claim(s)

CLAIMS

All statuses

CLAIM	EMPLOYEE	SUBMITTED	CLAIMED	APPROVED	STATUS	
Client visit — Meridian, Pune EXP-1001 - 1 line(s)	Ananya Krishnan NW1005	02 Sep 2026	1,200.00	1,200.00	Paid	> Open

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Administration → Expense claims. Awaiting approval, approved but unpaid, and paid.

The three tiles are the numbers finance actually asks for. The middle one — approved but unpaid — is the work queue: each of those rows can be marked paid with a payment reference, which is recorded against the claim and shown to the employee.

Approving for less than was claimed is allowed. An approver can reduce the amount — a meal above policy, say — but never increase it beyond what was submitted.

12. Recruitment

12.1 The pipeline

The screenshot displays the XcodeFix HRMS Recruitment Pipeline. The interface is divided into a sidebar on the left and a main content area. The sidebar contains navigation links for Home, To Do, Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, and Administration. The main content area shows the Recruitment Pipeline with five columns: Applied (2), Screening (1), Interview (1), Offer (1), and Hired (1). Each column contains candidate cards with names, titles, and status. A search bar and quick links are at the top, and a user profile for Meera Iyer is in the top right corner.

Applied	Screening	Interview	Offer	Hired
Aman Trivedi Senior Backend Engineer	Ishita Bansal Senior Backend Engineer	Sofia D Souza Senior Backend Engineer	Preeti Raman Senior Backend Engineer	Nikhil Rane Senior Backend Engineer 1 interview(s) 4.0/5
Rahul Nambiar Senior Backend Engineer Referral				

Recruitment. Everyone live, as a board — the fastest way to see where hiring is stuck.

Five columns, left to right: **Applied** → **Screening** → **Interview** → **Offer** → **Hired**. Rejected and withdrawn candidates leave the board rather than cluttering a sixth column; they are still on the Candidates list. Filter the whole board to one opening from the control above it.

12.2 Job openings

The screenshot displays the 'Job openings' section of the XcodeFix HRMS interface. The left sidebar contains navigation links for Home, To Do, Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, Pipeline, Job openings, Candidates, My Interviews, Refer someone, Engage, and various administrative settings. The main content area is titled 'Job openings' and includes a sub-header 'Roles you are hiring for'. A table lists existing openings, and a form on the right allows creating a new one.

ROLE	WHERE	SEATS	CANDIDATES	STATUS
Senior Backend Engineer JOB-101	Engineering Bengaluru HQ	1/2	6	Open

NEW OPENING
Reference JOB-102 will be allocated.

Job title *
e.g. Senior Software Engineer

Department
Not set

Designation
Not set

Grade
Not set

Location
Not set

Hiring manager
Not set

Seats
1

Type *
Full time

Salary range
Shown internally only.

About the role

What we are looking for

Status *
Open

+ Create opening

Recruitment → Job openings. Seats filled against seats open, and candidate counts.

An opening carries the department, designation, grade, location and hiring manager, so a candidate hired against it arrives with their placement already decided. The status dropdown on each row moves it between draft, open, on hold, filled and closed without opening a form.

12.3 Candidates

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RECRUITMENT CANDIDATES

Candidates

Search people, tickets, documents...

Quick Links

M1Meera Iyer
HR Manager

Candidates

Everyone who has applied

Pipeline

CANDIDATES

All openings

All stages

CANDIDATE	APPLIED FOR	SOURCE	INTERVIEWS	STAGE
Preeti Raman preeti.raman@example.test	Senior Backend Engineer	Direct	0	Offer
Aman Trivedi aman.trivedi@example.test	Senior Backend Engineer	Agency	0	Applied
Sofia D Souza sofia.dsouza@example.test	Senior Backend Engineer	Job board	0	Interview
Rahul Nambiar rahul.nambiar@example.test	Senior Backend Engineer	Referral by Ananya Krishnan	0	Applied
Ishita Bansal ishita.bansal@example.test	Senior Backend Engineer	Direct	0	Screening
Nikhil Rane nikhil.rane@example.test	Senior Backend Engineer	Direct	1 4.0/5	Hired

ADD A CANDIDATE

Full name *

Email *

Phone

Applying for

No specific opening

Source

Direct

Referred by

Nobody

Choosing someone marks the source as a referral.

Current CTC

Expected

Notice period

Résumé

Choose FileNo file chosen

PDF or Word.

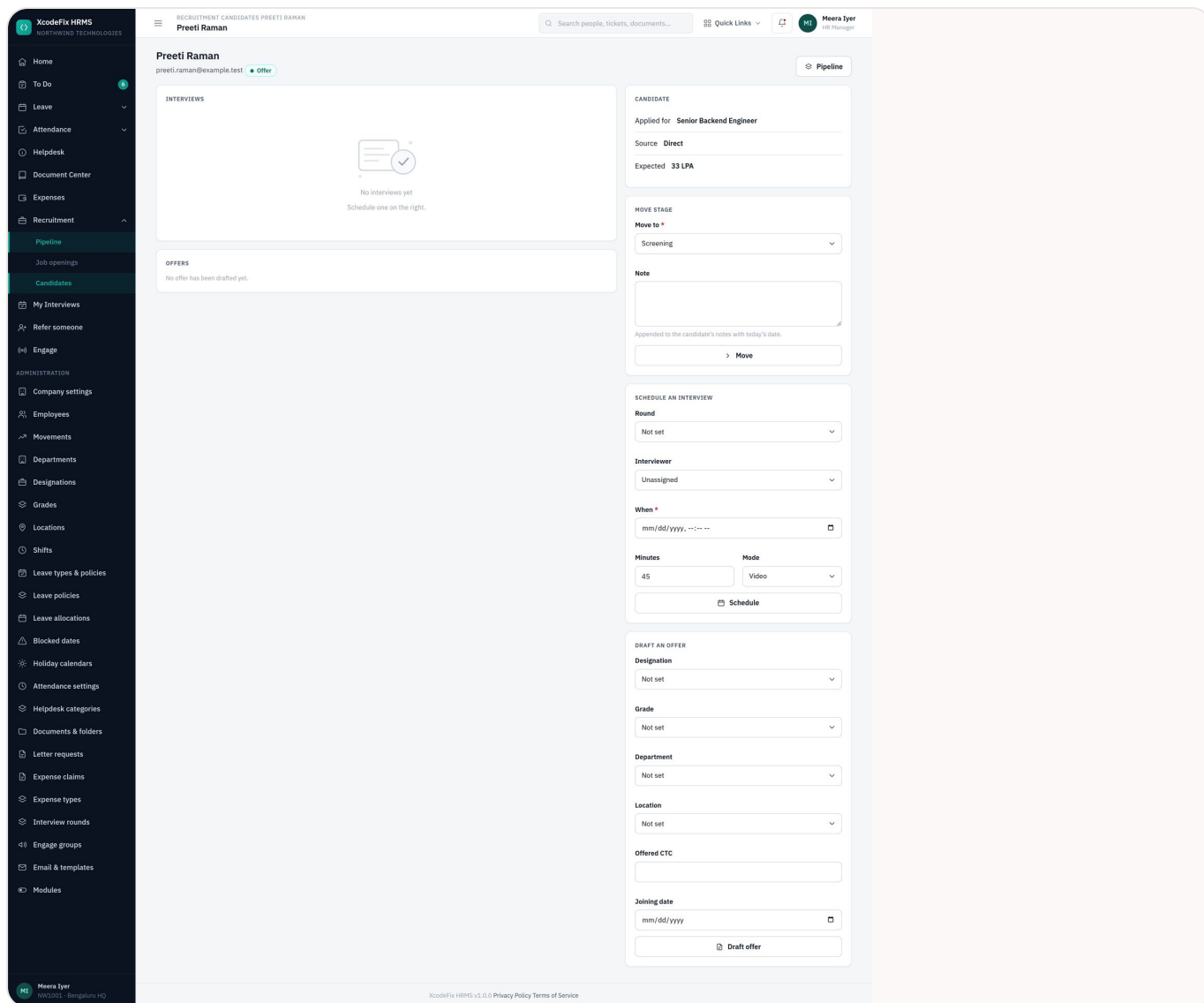
+ Add candidate

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Recruitment → Candidates. Everyone who has applied, including those no longer live.



A candidate: interviews and feedback on the left, the actions available to you on the right.

The same email may apply for two different openings, but not twice for the same one. Choosing a referrer marks the source as a referral automatically.

12.4 Interviews and feedback

The screenshot displays the 'Interview rounds' section of the XcodeFix HRMS. The main content area features a table with the following data:

ROUND	ORDER	STATUS	
Screening Recruiter call to check the basics	1	Active	Edit Delete
Technical Hands-on skills for the role	2	Active	Edit Delete
Managerial Fit with the team and the work	3	Active	Edit Delete
HR & Offer Expectations, notice and package	4	Active	Edit Delete

To the right of the table is a form titled 'ADD A ROUND'. It includes a 'Round name' field (with a hint 'e.g. Technical'), a 'Description' text area, a 'Sort order' field (set to 0), and a checked 'Active' checkbox. An 'Add round' button is at the bottom of the form.

The left sidebar contains the following navigation items: Home, To Do (6), Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, My Interviews, Refer someone, Engage, and a section for ADMINISTRATION including Company settings, Employees, Movements, Departments, Designations, Grades, Locations, Shifts, and Leave types & policies.

Administration → Interview rounds. Screening, Technical, Managerial, HR — whatever you run.

Scheduling an interview **moves the candidate into the Interview stage by itself**, so the board never lags behind what is actually happening. The interviewer sees it under **My Interviews** and records a 1–5 rating, a recommendation and written feedback.

Feedback belongs to the interviewer. Only they — or a recruiting administrator standing in — can submit it. Referrers never see it.

12.5 Offers and hiring

Draft an offer with the designation, grade, CTC and joining date; move it through **sent** and then **accepted** or **declined**. A declined offer takes the candidate off the board.

Once an offer is accepted, the **Hire** card appears. It creates the employee record from the candidate — carrying the offer's placement across — and links the two, so the pipeline shows where somebody ended up and nobody is hired twice. Sending their invitation is the separate, deliberate step described in [chapter 5](#).

12.6 Referrals

Employees put people forward from **Refer someone**. The referrer is taken from their session, so it cannot be spoofed, and they can watch how far their referral gets without seeing any interview feedback.

13. Performance

A review cycle has three moving parts: goals people set, the appraisal each person and their manager fill in, and the feedback colleagues give along the way. The product keeps them together so a review conversation starts from evidence rather than memory.

13.1 Appraisal cycles

Administration → Appraisal cycles. A cycle is a window with a name; launching it creates an appraisal for everyone in scope.

Set the period the cycle covers and the dates self-assessment and manager review are due, then **launch** it. Launching is the moment the cycle becomes real: every active employee gets an appraisal record, and everyone is notified. A cycle can be launched only once.

Launch when the list of people is right, not when the dates are. Dates can be edited afterwards; the set of appraisals is fixed at launch, so somebody who joins the next day is not in the cycle.

13.2 What people see

Each person gets their own appraisal to complete, their goals to update, and — if they manage anyone — a review to write for each report. Feedback can be given to anyone at any time and is attached to the person, not the cycle, so it is still there next year.

14. Payroll

Run payroll in parallel before you rely on it. For at least one full cycle, compute a run here and compare it line by line against whatever you pay from today. Payroll is the one place in this product where being wrong costs somebody money, and a parallel run is how you find the disagreement before an employee does.

14.1 Salary components

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ADMINISTRATION SALARY COMPONENTS

Salary components

Search people, tickets, documents...

Quick Links

M1 Meera Iyer

HR Manager

Salary components

The earnings and deductions a structure is built from

Payroll is in preview. Statutory deductions — income tax, PF, ESI and professional tax — are not calculated here yet. Run it alongside your existing payroll and reconcile before relying on it.

COMPONENT	KIND	HOW IT IS WORKED OUT	PRO-RATES	STATUS	
Basic salary BASIC	Earning	Percent of base	Yes	Active	Edit Delete
House rent allowance HRA	Earning	Percent of base	Yes	Active	Edit Delete
Conveyance CONV	Earning	Fixed amount	Yes	Active	Edit Delete
Special allowance SPL	Earning	Percent of base	Yes	Active	Edit Delete
Meal card MEAL	Earning	Fixed amount	Yes	Active	Edit Delete

ADD A COMPONENT

Code *
BASIC

Order
0

Name *

Kind *
Earning

Worked out as *
A fixed amount

Set on the structure, per employee band.

Description

☒ Reduce for unpaid leave

☒ Taxable

☒ Active

Add component

Administration → Salary components. The earnings and deductions a structure is built from.

SETTING	WHAT IT DOES
Calculation	A fixed amount, or a percentage of the person's base salary
Taxable	Whether this component forms part of the wage that tax and statutory rules are worked out on
Pro-rates	Whether unpaid leave reduces it. A monthly allowance usually does; a fixed reimbursement often does not

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14.2 Structures and assignments

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ADMINISTRATIONSALARY STRUCTURES

Salary structures

Named packages of earnings and deductions

ComponentsAssignments

STRUCTURE	COMPONENTS	ASSIGNED	STATUS
Standard 2026 Basic 50%, HRA 20%, special allowance 30%, plus fixed allowances	5	17	ActiveEdit

NEW STRUCTURE

Structure name*
e.g. Standard – Professional

Description

COMPONENTS
Leave a figure at zero to keep the component out of this structure.

Basic salary BASIC · earning · % of base
0

House rent allowance HRA · earning · % of base
0

Conveyance CONV · earning
0

Special allowance SPL · earning · % of base
0

Meal card MEAL · earning
0

☒ Active

✓ Create structure

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Administration → Salary structures. A structure is a named set of components with their amounts or percentages.

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ADMINISTRATION SALARY ASSIGNMENTS
Salary assignments

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Salary assignments
Who is on which structure, and what they are based on

EMPLOYEE	STRUCTURE	BASE	FROM	TO
Aditya Verma NW1016	Standard 2026	58,300.00	03 Jul 2026	Current
Ritu Chauhan NW1017	Standard 2026	59,800.00	03 Apr 2026	Current
Ananya Krishnan NW1005	Standard 2026	64,300.00	01 Apr 2026	Current
Arjun Rao NW1002	Standard 2026	59,800.00	01 Apr 2026	Current
Daniel Fernandes NW1008	Standard 2026	61,300.00	01 Apr 2026	Current
Fatima Sheikh NW1007	Standard 2026	59,800.00	01 Apr 2026	Current
Imran Qureshi NW1012	Standard 2026	59,800.00	01 Apr 2026	Current
Kavita Menon NW1003	Standard 2026	61,300.00	01 Apr 2026	Current
Lakshmi Pillai NW1013	Standard 2026	61,300.00	01 Apr 2026	Current
Meera Iyer NW1001	Standard 2026	58,300.00	01 Apr 2026	Current
Neha Gupta NW1011	Standard 2026	58,300.00	01 Apr 2026	Current
Priya Nair NW1009	Standard 2026	62,800.00	01 Apr 2026	Current
Rohit Deshmukh NW1004	Standard 2026	62,800.00	01 Apr 2026	Current
Sahil Kapoor NW1010	Standard 2026	64,300.00	01 Apr 2026	Current
Sneha Joshi NW1015	Standard 2026	64,300.00	01 Apr 2026	Current
Tarun Bhatia NW1014	Standard 2026	62,800.00	01 Apr 2026	Current
Vikram Singh NW1006	Standard 2026	58,300.00	01 Apr 2026	Current

Payroll runs

ASSIGN A STRUCTURE
A new assignment closes the previous one the day before it starts.

Employee *
 Choose a person

Structure *
 Choose a structure

Monthly base *

Percent components are worked out from this.

Effective from *
 09/01/2026

Save assignment

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Administration → Salary assignments. Which structure a person is on, and the base salary the percentages are applied to.

An assignment has a start date. Giving somebody a rise means adding a new assignment from the date it takes effect, not editing the old one — which is what lets last year's payroll still compute last year's answer.

14.3 Additional salary

The screenshot displays the 'Additional salary' section of the XcodeFix HRMS. The left sidebar contains navigation links for Home, To Do, Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, My Interviews, Refer someone, Performance, Reviews, My Payslips, Tax statement, Tax declaration, Daily summary, Summary digest, Timesheet, Time review, Recognition, Engage, and Administration. The main content area is titled 'ADMINISTRATION ADDITIONAL SALARY' and 'Additional salary'. It includes a search bar, 'Quick Links', and a user profile for Meera Iyer. Below the title, there is a sub-header 'One-off and recurring payments outside the salary structure' and a 'Payroll runs' button. A table lists active additional salary payments:

EMPLOYEE	PAYMENT	WHEN	AMOUNT	
Rohit Deshmukh NW1004	Revision arrears Arrears · Earning	24 Aug 2026	12,400.00	
Kavita Menon NW1003	Retention bonus Retention bonus · Earning	24 Aug 2026	50,000.00	
Arjun Rao NW1002	Q2 sales incentive Incentive · Earning	24 Aug 2026	18,000.00	
Meera Iyer NW1001	Festival bonus Bonus · Earning	24 Aug 2026	25,000.00	

Below the table, there is a form to 'ADD A PAYMENT'. The form includes fields for Employee (dropdown), Name on the payslip (text), Payslip code (text), Kind of payment (dropdown), Adds to or takes from pay (dropdown), Amount (text), Pay on (date), Repeat every run (checkbox), Repeat from (date), Repeat until (date), Counts as taxable pay (checkbox), and Why (text). A green 'Add payment' button is at the bottom right.

Administration → Additional salary. Bonuses, incentives, arrears and one-off recoveries, kept outside the structure.

A one-off is paid by the run whose period contains its date. A recurring entry is paid by every run its dates overlap. Either way the amount is paid **in full** — a bonus is a decision about a number, so half a month of unpaid leave does not halve it, unlike every component in the structure.

Entries are cancelled rather than deleted. Why somebody was *not* paid a bonus is a question that gets asked as often as the other one.

14.4 Statutory deductions

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ADMINISTRATION STATUTORY DEDUCTIONS

Statutory deductions

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Statutory deductions

The rules payroll applies, as your organisation set them

Exemptions

Payroll runs

No rates are supplied with the product.

Every percentage, ceiling, threshold and band below is one you enter from your own compliance advice. A rule you have not set up deducts nothing – payroll will not guess. Rules are dated, so changing a rate next April leaves this year's paylips as they were.

IN FORCE TODAY

Provident fund

Active

State insurance

Active

Professional tax

Active

Income tax (TDS)

Active

ALL RULES

Provident fund

Provident fund - from 01 Apr 2026

On

Edit

State insurance

State insurance - from 01 Apr 2026

On

Edit

Professional tax

Professional tax - from 01 Apr 2026 - 3 bands

On

Edit

Income tax (TDS)

Income tax (TDS) - from 01 Apr 2026

On

Edit

ADD A RULE

Deduction *

Choose one

Name on the payslip *

e.g. Provident fund

Payslip code *

PF

Applied to

Basic salary

Effective from *

09/03/2026

Effective to

mm/dd/yyyy

Which wage the rule is worked out on

RATES AND LIMITS

Leave anything that does not apply at zero. A ceiling caps the wage the rate is taken of, a threshold stops the rule applying at all above that wage.

Employee rate %

0

Employer rate %

0

Wage ceiling

0

Wage threshold

0

Flat amount

0

Rounding

Nearest rupee

INCOME TAX ONLY

Tax slab to project against

Not applicable

PROFESSIONAL TAX BANDS

Only used for professional tax: a flat amount for each wage band. Leave the upper limit blank on the last band to mean "and above". Blank rows are ignored.

WAGE FROM	UP TO	DEDUCT
	and above	
	and above	
	and above	
	and above	

Where these figures came from

Useful the next time somebody asks why this rate

☒ Apply this rule

Add rule

Administration → Statutory deductions. Provident fund, state insurance, professional tax and TDS – each one a rule you enter.

No rates are supplied with this product, deliberately. Every percentage, ceiling, threshold and band is one you enter from your own compliance advice. Shipping rates would mean every customer silently inheriting whatever happened to be correct on the day the software was written, and going quietly wrong the year it changed. A rule you have not set up deducts nothing – payroll will not guess.

FIELD	WHAT IT MEANS
Applied to	Which wage the rule works on: basic salary, gross pay, or taxable gross
Employee rate	The percentage taken from the person's pay
Employer rate	The company's share. It is recorded as a cost and shown on the payslip, and it never reduces net pay
Wage ceiling	Caps the wage the rate is applied to. The rule still applies above it, just on the capped amount

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FIELD	WHAT IT MEANS
Wage threshold	Stops the rule applying at all above that wage. This is the difference that catches people out: a ceiling caps, a threshold excludes
Effective from / to	Rules are dated rather than edited in place, so a March run keeps computing March's answer after April's rates arrive

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STATUTORY DEDUCTIONS

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Statutory deductions

The rules payroll applies, as your organisation set them

Exemptions Payroll runs

No rates are supplied with the product.

Every percentage, ceiling, threshold and band below is one you enter from your own compliance advice. A rule you have not set up deducts nothing – payroll will not guess. Rules are dated, so changing a rate next April leaves this year's payslips as they were.

IN FORCE TODAY

Provident fund

State insurance

Professional tax

Income tax (TDS)

ALL RULES

Provident fund

State insurance

Professional tax

Income tax (TDS)

EDIT RULE

Deduction *

Name on the payslip *

Payslip code *

Applied to

Effective from *

Effective to

RATES AND LIMITS

Employee rate %

Employer rate %

Wage ceiling

Wage threshold

Fiat amount

Rounding

INCOME TAX ONLY

Tax slab to project against

PROFESSIONAL TAX BANDS

WAGE FROM	UP TO	DEDUCT
0.00	15000.00	0.00
15000.01	25000.00	150.00
25000.01	and above	200.00
	and above	
	and above	
	and above	
	and above	
	and above	

Where these figures came from

Demo figures only.

Apply this rule

Save rule

Professional tax is a flat amount per wage band, so it is entered as bands rather than a rate. Leave the upper limit blank on the last one to mean “and above”.

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ADMINISTRATION STATUTORY DEDUCTIONS EXEMPTIONS

Statutory exemptions

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Statutory exemptions

People a deduction does not apply to

An active rule applies to everyone by default. Record an exemption here for the exceptions your advice tells you about – an apprentice outside provident fund, a director outside state insurance. It takes effect on the next run you compute.

EMPLOYEE	EXEMPT FROM	REASON
Meera Iyer NW1001	State insurance	Above the wage threshold and a director

RECORD AN EXEMPTION

Employee *
Choose someone

Exempt from *
Choose a deduction

Reason
e.g. Apprentice

Recorded for the audit trail

Record exemption

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Statutory deductions → Exemptions. An active rule applies to everyone; this is where the exceptions are recorded.

14.5 Running payroll

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ADMINISTRATION PAYROLL RUNS

Payroll runs

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Payroll runs

Draft, compute, check, finalise

Payroll is in preview. Income tax, PF, ESI and professional tax are **not** calculated. A draft can be recomputed as often as you like; finalising freezes the run and publishes payslips to employees. Reconcile against your existing payroll before you pay anyone from this.

RUN	PERIOD	PEOPLE	NET	STATUS
August 2026 payroll pay 05 Sep 2026	01 Aug – 31 Aug 2026	17	1,052,259.00	Finalised

NEW RUN

Run name *
September 2026 payroll

From *
09/01/2026

To *
09/30/2026

Pay date
mm/dd/yyyy

Notes

Create run

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Administration → Payroll runs. A run covers a period. Compute rebuilds it; finalise freezes it.

1. Create a run for the period, with the date people are to be paid.
2. **Compute.** Every payslip in the run is deleted and rebuilt from the structures, additional salary and statutory rules as they stand. Correct something and compute again as often as you like.

3. Check the register and a few payslips.
4. **Finalise.** The run becomes read-only and payslips are published to employees. A finalised run cannot be recomputed — it is a record of what was paid.

Compute is destructive and that is the point. A draft run is rebuilt rather than patched, so a component you removed actually disappears instead of lingering from the previous attempt.

14.6 The salary register and the bank file

The screenshot displays the 'Salary register' page for August 2026 payroll. The interface includes a sidebar with navigation options like Home, To Do, Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, My Interviews, Refer someone, Performance, Reviews, My Payslips, Tax statement, Tax declaration, Daily summary, Summary digest, Timesheet, Time review, Recognition, Engage, and ADMINISTRATION (Company settings, Insights, Workforce, Employees, Movements, Exits, Departments, Designations, Grades, Locations, Shifts, Leave types & policies, Leave policies, Leave allocations).

The main content area shows the 'Salary register' for August 2026 payroll (01 Aug 2026 – 31 Aug 2026). It includes a 'Download CSV' button and a 'Bank payment file' button. Below this is a 'STATUTORY SUMMARY' table showing deductions for 17 employees, and a 'REGISTER' table listing 17 employees with their respective salaries and allowances.

STATUTORY SUMMARY					What is owed on this run, by deduction				
DEDUCTION	PEOPLE	FROM EMPLOYEES	FROM THE EMPLOYER	TOTAL PAYABLE					
Provident fund	17	30,600.00	30,600.00	61,200.00					
Professional tax	17	3,400.00	0.00	3,400.00					
Income tax (TDS)	17	134,941.00	0.00	134,941.00					

REGISTER										
EMPLOYEE	DAYS	BASIC SALARY	HOUSE RENT ALLOWANCE	CONVEYANCE	SPECIAL ALLOWANCE	MEAL CARD	REVISION ARREARS	FESTIVAL BONUS	Q2 SALES INCENTIVE	
Aditya Verma NW1016 - Engineering	31	29,150.00	11,660.00	2,400.00	17,490.00	2,200.00	—	—	—	
Ananya Krishnan NW1005 - Engineering	31	32,150.00	12,860.00	2,400.00	19,290.00	2,200.00	—	—	—	
Arjun Rao NW1002 - Engineering	31	29,900.00	11,960.00	2,400.00	17,940.00	2,200.00	—	—	18,000.00	
Daniel Fernandes NW1008 - Engineering	31	30,650.00	12,260.00	2,400.00	18,390.00	2,200.00	—	—	—	
Fatima Sheikh NW1007 - Engineering	31	29,900.00	11,960.00	2,400.00	17,940.00	2,200.00	—	—	—	
Imran Qureshi NW1012 - Sales & Marketing	31	29,900.00	11,960.00	2,400.00	17,940.00	2,200.00	—	—	—	
Kavita Menon NW1003 - Engineering	31	30,650.00	12,260.00	2,400.00	18,390.00	2,200.00	—	—	—	
Lakshmi Pillai NW1013 - Customer Success	31	30,650.00	12,260.00	2,400.00	18,390.00	2,200.00	—	—	—	
Meera Iyer NW1001 - People & Culture	31	29,150.00	11,660.00	2,400.00	17,490.00	2,200.00	—	25,000.00	—	
Neha Gupta NW1011 - Sales & Marketing	31	29,150.00	11,660.00	2,400.00	17,490.00	2,200.00	—	—	—	
Priya Nair NW1009 - Product & Design	31	31,400.00	12,560.00	2,400.00	18,840.00	2,200.00	—	—	—	
Ritu Chauhan NW1017 - Customer Success	31	29,900.00	11,960.00	2,400.00	17,940.00	2,200.00	—	—	—	
Rohit Deshmukh NW1004 - Engineering	31	31,400.00	12,560.00	2,400.00	18,840.00	2,200.00	12,400.00	—	—	
Sahil Kapoor NW1010 - Product & Design	31	32,150.00	12,860.00	2,400.00	19,290.00	2,200.00	—	—	—	
Sneha Joshi NW1013 - Finance & Legal	31	32,150.00	12,860.00	2,400.00	19,290.00	2,200.00	—	—	—	
Tarun Bhatia NW1014 - People & Culture	31	31,400.00	12,560.00	2,400.00	18,840.00	2,200.00	—	—	—	
Vikram Singh NW1006 - Engineering	31	29,150.00	11,660.00	2,400.00	17,490.00	2,200.00	—	—	—	
Total		518,800.00	207,520.00	40,800.00	311,280.00	37,400.00	12,400.00	25,000.00	18,000.00	5

Employer contributions are shown for completeness. They are a cost to the company and are not included in the deductions or net columns.

A run → **Salary register.** Every component for every person in one sheet, with the statutory summary above it.

The statutory summary is what each authority is owed for this run, split between the employees' share and the company's. The register below it can be downloaded as a CSV for your accountant.

The **bank payment file** lists everyone with a net amount to pay, with their account and IFSC. It is available only once a run is finalised: a draft can still change, and a payment file is an instruction to move money. Anyone without bank details on file is left out of the file and reported on screen rather than silently dropped.

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Meera Iyer

HR Manager

Payslip

Aditya Verma · August 2026 payroll

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EARNINGS

COMPONENT	FULL	PAID
Basic salary BASIC	29,150.00	29,150.00
House rent allowance HRA	11,660.00	11,660.00
Conveyance CONV	2,400.00	2,400.00
Special allowance SPL	17,490.00	17,490.00
Meal card MEAL	2,200.00	2,200.00
Gross		62,900.00

DEDUCTIONS

COMPONENT	FULL	TAKEN
Provident fund • Statutory PF	1,800.00	1,800.00
Professional tax • Statutory PT	200.00	200.00
Income tax (TDS) • Statutory TDS	5,303.00	5,303.00
Total deductions		7,303.00

NET PAY

55,597.00

Gross less deductions.

EMPLOYER CONTRIBUTIONS

Paid by the company on top of your salary

Provident fund (employer)	1,800.00
Total	1,800.00

These do not reduce your net pay.

DETAILS

Employee **Aditya Verma**

Code **NW1016**

Designation **Software Engineer**

Period **01 Aug – 31 Aug 2026**

Pay date **05 Sep 2026**

Structure **Standard 2026**

Base **58,300.00**

Payable days **31 of 31**

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One payslip. Statutory lines are labelled as such, and employer contributions are shown separately with a note that they do not reduce net pay.

Net pay never goes below zero. A month of unpaid leave can legitimately produce a zero payslip, but deductions are never allowed to overdraw someone's pay — if that would happen, the data is wrong and needs correcting rather than paying.

15. Tax declarations

Employees declare what they intend to invest, upload the proofs, and HR verifies them. What HR accepts is what reduces the tax withheld from their pay — so the loop matters, not just the form.

The same rule as statutory deductions applies. Slabs, section limits and the standard deduction are numbers you enter from your own advice. Nothing here ships with a rate.

15.1 Tax slabs

ADMINISTRATION TAX SLABS
Tax slabs

The bands your payroll calculates against

These numbers are yours to set. Nothing here ships with rates built in — enter the bands, the standard deduction and the section limits your own compliance advice gives you, and the product does the arithmetic against them. Check them at the start of every financial year.

SLABS

- FY 2026-27 — new regime (Active) [Edit]
- FY 2026-27 — old regime (Active) [Edit]

EDIT SLAB [Cancel]

Slab name * FY 2026-27 — new regime

Financial year * 2026-27

Regime New regime
Optional — whatever your team calls it

Standard deduction
75000.00
Subtracted before the bands are applied

Notes
Demo figures only — replace with your own advice.
Where these figures came from — useful a year from now

BANDS
Leave the upper limit blank on the last band to mean "and above". Blank rows are ignored.

FROM	UP TO	RATE %
0.00	400000.00	0.00
400000.00	800000.00	5.00
800000.00	1200000.00	10.00
1200000.00	1600000.00	15.00
1600000.00	and above	20.00
	and above	
	and above	
	and above	
	and above	

☒ Available for declarations

Administration → Tax slabs. Bands, the standard deduction, and a note recording where the figures came from.

Add one slab per regime you offer. The standard deduction is subtracted before the bands are applied. Leave the upper limit blank on the last band to mean “and above”. The notes field is worth filling in — a year from now, somebody will ask why these numbers.

15.2 Exemption categories

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ADMINISTRATION EXEMPTION CATEGORIES
Exemption categories

Search people, tickets, documents... Quick Links Meera Iyer HR Manager

Exemption categories
The sections people may declare against, and the cap on each

SECTION	CAP	PROOF	STATUS
80C — Life insurance, PPF, ELSS, tuition fees Total across all 80C instruments.	150,000.00	Required	Active
80D — Health insurance premium Higher limits may apply for senior citizens.	25,000.00	Required	Active
80CCD — National Pension System (additional) Over and above 80C.	50,000.00	Required	Active
HRA — House rent paid Attach rent receipts and the landlord PAN where required.	No cap	Required	Active
24B — Home loan interest Interest component only.	200,000.00	Required	Active

ADD A CATEGORY

Section code *
e.g. 80C

Name *
Life insurance, PPF, ELSS

Maximum claimable
0
Leave 0 for no cap. Declarations above the cap are trimmed to it.

Help text

Shown to employees under the field

Order
0

☒ **Proof required**

☒ **Available to employees**

✓ Add category

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Administration → Exemption categories. The sections people may declare against, and the cap on each.

A declaration above the cap is trimmed to the cap when it is saved, not argued about at verification time. The help text you write here is shown to employees under the field, which is the cheapest way to reduce the number of questions you get.

15.3 Verifying proofs

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ADMINISTRATION DECLARATIONS

Investment declarations

What people declared, and the proofs waiting on you

1 declaration waiting to be reviewed.

AllWaiting on youVerifiedRejected

EMPLOYEE	YEAR	REGIME	DECLARED	VERIFIED	PROOFS	STATUS
AR Arjun Rao NW1002	2026-27	FY 2026-27 — old regime	384,000.00	0.00	2 to check	Submitted Review
MI Meera Iyer NW1001	2026-27	FY 2026-27 — old regime	354,000.00	174,000.00	3 lines	Verified Review

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Administration → Declarations. Submitted, verified and rejected, with a count of proofs waiting on you.

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ADMINISTRATION DECLARATIONS MEERA IYER

Declaration — Meera Iyer

Search people, tickets, documents...

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Meera Iyer
HR Manager

Meera Iyer
NW1001 · 2026-27 · FY 2026-27 — old regime

Back to list

DECLARED INVESTMENTS

Accept, reject or leave each line pending

80C — Life insurance, PPF, ELSS, tuition fees

Declared 150,000.00 · cap 150,000.00

No proof uploaded

Decision

Accept

Amount accepted

150000.00

Cannot exceed what was declared

Note to the employee

80D — Health insurance premium

Declared 24,000.00 · cap 25,000.00

No proof uploaded

Decision

Accept

Amount accepted

24000.00

Cannot exceed what was declared

Note to the employee

24B — Home loan interest

Declared 180,000.00 · cap 200,000.00

No proof uploaded

Decision

Reject

Amount accepted

180000.00

Cannot exceed what was declared

Note to the employee

Certificate covers 8 month

Overall note

Home loan interest certificate covers part of the year only.

Save review

This declaration is already verified — saving again updates it.

SUMMARY

DECLARED 354,000.00

VERIFIED 174,000.00

Submitted 14 Aug 2026

Reviewed 28 Aug 2026

FY 2026-27 — OLD REGIME

0 – 250,000	0%
250,000 – 500,000	5%
500,000 – 1,000,000	20%
1,000,000 and above	30%

These bands were entered by your organisation, not shipped with the product.

One declaration. Each line is accepted, rejected, or left pending, with the amount you are prepared to accept and a note the employee will read.

You can accept *less* than was declared — a certificate covering eight months of the year, say — but never more. Accepting more than somebody claimed would be inventing a claim on their behalf, so the product will not do it whatever is typed in the box.

Only verified amounts reduce TDS. A declaration that has been submitted but not yet verified is an intention. Withholding less tax on the strength of an unproven intention is exactly what leaves someone with a bill in March.

15.4 What was withheld

ADMINISTRATION TAX WITHHELD
Tax withheld

What was deducted, and for whom, over a financial year

Financial year: 2026-27 [Show](#)

Derived from finalised payroll every time this page loads — never a saved snapshot, so it cannot drift away from the payslips people were given. Drafts are not counted.

FY 2026-27 17 employees with tax withheld

EMPLOYEE	PAN ON FILE	GROSS PAID	TAX WITHHELD
Aditya Verma NW1016	● On file	62,900.00	5,303.00
Ananya Krishnan NW1005	● On file	68,900.00	7,103.00
Arjun Rao NW1002	● On file	82,400.00	11,153.00
Daniel Fernandes NW1008	● On file	65,900.00	6,203.00
Fatima Sheikh NW1007	● On file	64,400.00	5,753.00
Imran Qureshi NW1012	● On file	64,400.00	5,753.00
Kavita Menon NW1003	● On file	115,900.00	24,773.00
Lakshmi Pillai NW1013	● On file	65,900.00	6,203.00
Meera Iyer NW1001	● On file	87,900.00	8,453.00
Neha Gupta NW1011	● On file	62,900.00	5,303.00
Priya Nair NW1009	● On file	67,400.00	6,653.00
Ritu Chauhan NW1017	● On file	64,400.00	5,753.00
Rohit Deshmukh NW1004	● On file	79,800.00	10,373.00
Sahil Kapoor NW1010	● On file	68,900.00	7,103.00
Sneha Joshi NW1015	● On file	68,900.00	7,103.00
Tarun Bhatia NW1014	● On file	67,400.00	6,653.00
Vikram Singh NW1006	● On file	62,900.00	5,303.00
Total		1,221,200.00	134,941.00

The PAN column only says whether one is recorded. The number itself is encrypted at rest and appears in the CSV export, which is audited.

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Administration → Tax withheld. A financial year's deductions, per person, with a CSV for whoever files the return.

This is derived from finalised payroll every time the page loads — never a saved snapshot, so it cannot drift away from the payslips people were actually given. Draft runs are not counted.

The PAN column only says whether one is on file; the number itself is encrypted at rest and appears in the CSV export, which is audited. A row flagged **Missing** is worth chasing before you file.

This is not a Form 16. A Form 16 is issued from the tax authority's own system against tax actually deposited there, and this product has no visibility of your challans. What it gives you is the figure you withheld and the months it came from — the worksheet, not the certificate. Employees see their own version of it under **Tax statement**, and it says the same thing.

16. Timesheets

A timesheet is a week. The employee fills it in, submits it, and their manager approves or sends it back — the same boundary as a leave application, and for the same reason: once somebody else is relying on the numbers, the person who entered them should not be able to change them quietly.

16.1 Projects

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ADMINISTRATION PROJECTS

Projects

What people can log their time against

PROJECTS

PROJECT	CLIENT	BILLABLE	STATUS	
Acme portal rebuild ACME-01	Acme Retail	Yes	Active	EditDelete
Globex integration GLOBEX	Globex Corp	Yes	Active	EditDelete
Internal tooling NW-INT	—	No	Active	EditDelete

HOURS BY PROJECT

Approved weeks only

From

To

Apply

06/05/2026

09/03/2026

PROJECT	PEOPLE	HOURS	BILLABLE
Internal tooling NW-INT	3	38.00	0.00
Globex integration GLOBEX	3	38.00	38.00
Acme portal rebuild ACME-01	3	38.00	38.00

ADD A PROJECT

Project code *
ACME-01

Project name *

Client

Time on this is billable

Available to log against

Add project

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Administration → Projects. What time can be logged against, and what has been logged, over any date range.

A project marked **billable** makes every hour logged against it billable. Time can also be logged with no project at all, which is how internal work is recorded without inventing a project for it. The hours report counts *approved* weeks only — an unapproved week is a claim, not a fact.

16.2 Reviewing the team's weeks

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TIMESHEETS TO REVIEW

Timesheets to review

Search people, tickets, documents...

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M1

Meera Iyer

HR Manager

Timesheets to review

Every submitted week

3 weeks waiting on you.

WaitingApprovedSent backAll

EMPLOYEE	WEEK	HOURS	BILLABLE	STATUS	
AK Ananya Krishnan NW1005	24 Aug 2026	38.00	30.00	Submitted	Open
KM Kavita Menon NW1003	24 Aug 2026	38.00	22.50	Submitted	Open
RD Rohit Deshmukh NW1004	24 Aug 2026	38.00	23.50	Submitted	Open

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Time review. Managers see their own team; an administrator sees everyone.

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TIMESHEETS TO REVIEW KAVITA MENON

Timesheet – Kavita Menon

Quick Links

Meera Iyer
HR Manager

Kavita Menon

Week of 24 Aug 2026 · 38.00 hours (22.50 billable)

Back

HOURS LOGGED

24 AUG 2026

Acme portal rebuild

Sprint work

Billable

8.00 h

25 AUG 2026

Internal tooling

Code review and fixes

7.50 h

26 AUG 2026

Globex integration

Client call and follow-up

Billable

8.00 h

27 AUG 2026

Acme portal rebuild

Documentation

Billable

6.50 h

28 AUG 2026

Internal tooling

Release preparation

8.00 h

YOUR DECISION

Note

Shown to the employee – required in practice if you send it back

Approve

Send back

STATUS

State

Submitted

Submitted

29 Aug 2026

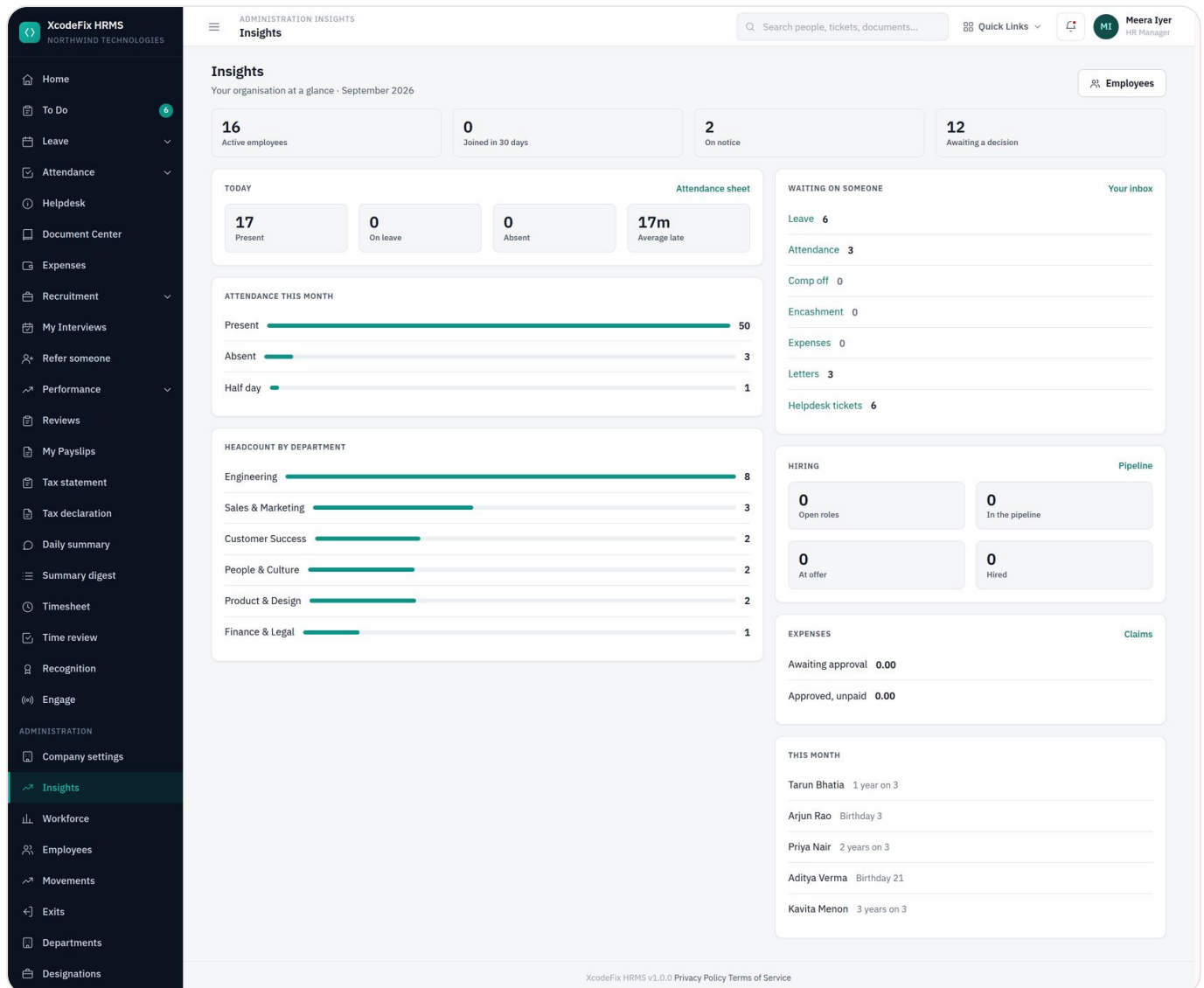
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One week, grouped by day, with the note the person wrote against each entry.

Sending a week back returns it to the employee as a draft to correct and resubmit. Nobody can approve their own timesheet, including an administrator.

17. Workforce analytics and planning

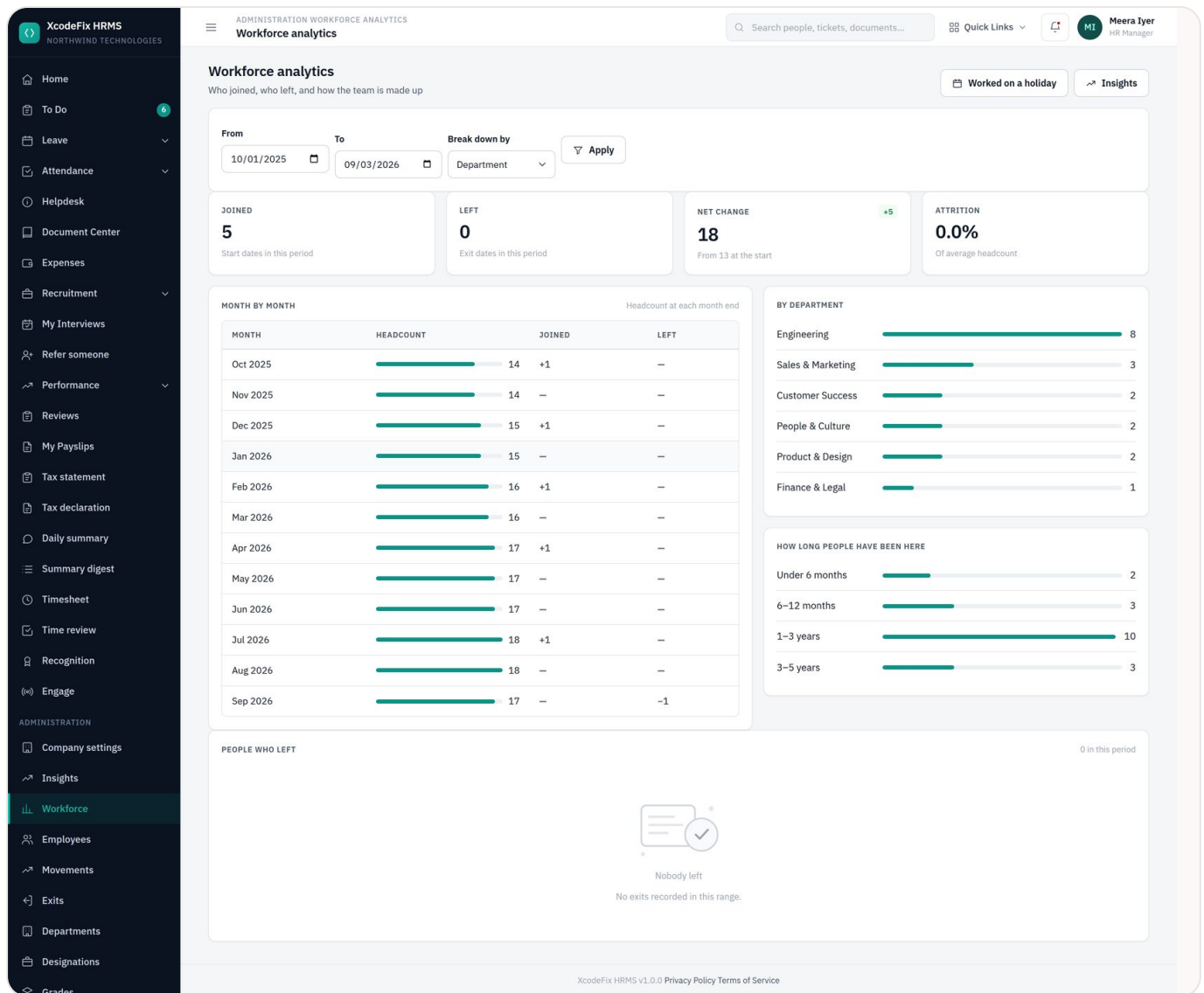
17.1 Insights



Administration → Insights. The organisation today: headcount, who is off, attendance, and everything waiting for a decision.

Insights answers “what is happening right now”. The approvals tile is the useful one on a Monday morning — each number links straight to the queue behind it.

17.2 Workforce analytics

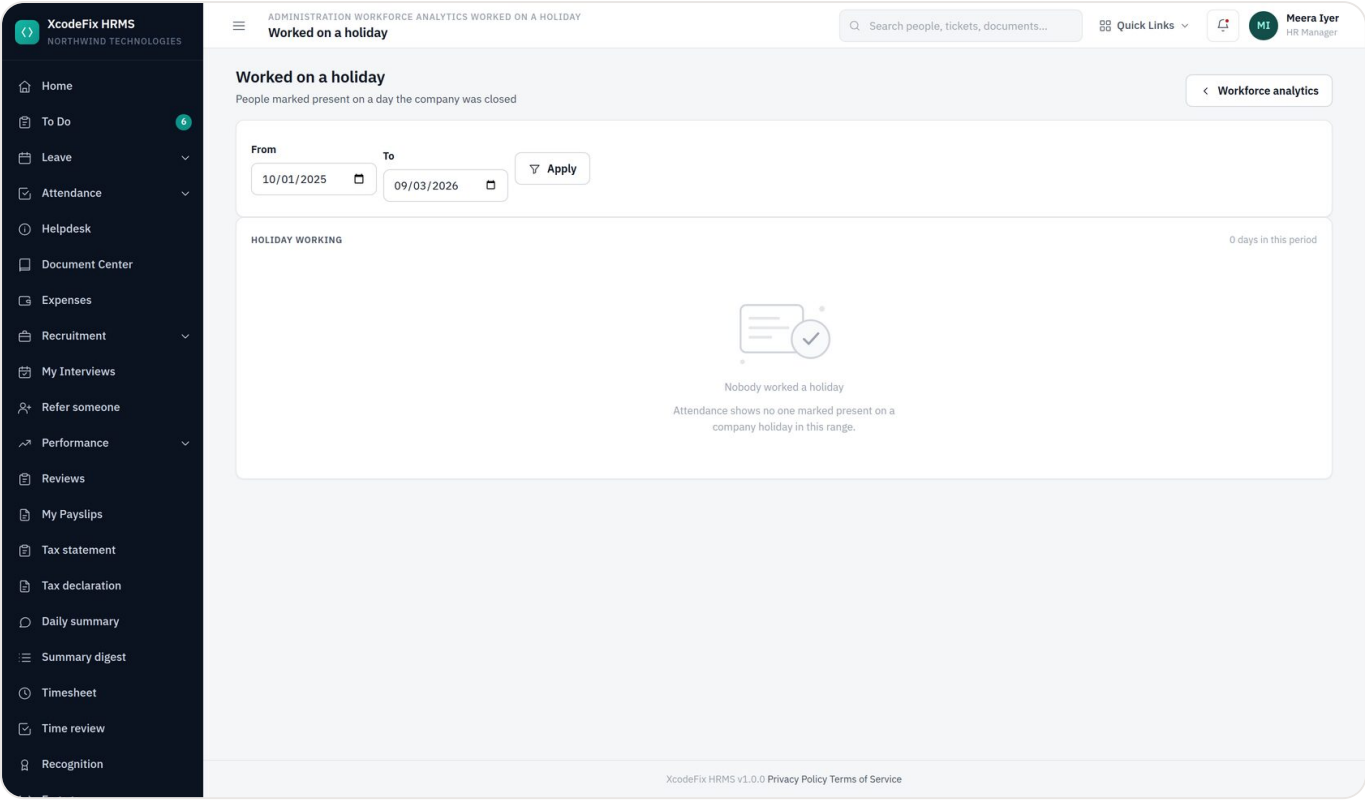


Administration → **Workforce**. Joiners, leavers, attrition and the shape of the team over any period.

Where **Insights** is about today, this is about change. Set a period and the report shows who joined, who left, headcount at each month end, and how people are distributed by department, designation, grade, location, employment type or gender.

Attrition is measured against average headcount — the mean of the opening and closing figures — not against either end. An organisation that doubled during the period would otherwise show a rate that looks alarming or reassuring purely because of which end you picked.

17.3 Who worked on a holiday



Workforce → **Worked on a holiday**. People marked present on a day the company was closed, and whether they claimed the day back.

A row here without a compensatory-off claim is not necessarily a problem. It is, however, the list worth checking before somebody notices they were never given the day back.

17.4 Staffing plans

Staffing plans
Headcount agreed, and what has been opened against it

PLANS

FY 2026-27 hiring
01 Apr 2026 – 31 Mar 2027 - 11 planned
Approved Open

PROGRESS

ROLE	PLANNED	OPENED
Customer Success	2	0
Engineering	6	0
Sales & Marketing	3	0

EDIT PLAN

Plan name *
FY 2026-27 hiring

From *
04/01/2026

To *
03/31/2027

ROLES TO HIRE

A line with no count is ignored. The cost is per hire.

DEPARTMENT	DESIGNATION	HOW MANY	COST EACH	NOTE
Customer Suc	Any	2	900000.00	
Engineering	Any	6	1800000.00	Two seniors, four
Sales & Marke	Any	3	1200000.00	Regional coverag
Any	Any			
Any	Any			
Any	Any			
Any	Any			

Notes

Agreed at the March board meeting.

Save plan

Close this plan

Administration → Staffing plans. Headcount that was agreed, and what has been opened against it.

A plan is a budget decision; a job opening is a recruiting activity. Keeping them apart is what lets anyone answer “are we hiring more than we agreed” — a question with no answer if the only record of the agreement is the openings themselves.

1. Create the plan with a period and a line per role: department, designation, how many, and the cost of each hire.
2. **Approve** it. Only an approved plan offers its lines to job openings.
3. When raising an opening, choose the plan line it draws against. The plan then shows planned, opened and hired side by side, and flags a line that has gone over.

Closing an opening releases the headcount again. Every other state — draft, open, on hold, filled — counts as drawn down against the plan.

18. Daily work summary

A standing question, asked of a group every working day, with the answers collected in one place. It is not a timesheet and is not trying to be: a timesheet asks how many hours went where and is approved, a summary asks what somebody did and is read. Use either, both, or neither.

18.1 Setting a group up

The screenshot displays the 'Daily summary groups' page in the XcodeFix HRMS system. The left sidebar contains navigation links for Home, To Do, Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, My Interviews, Refer someone, Performance, Reviews, My Payslips, Tax statement, Tax declaration, Daily summary, Summary digest, Timesheet, Time review, Recognition, Engage, Company settings, Insights, Workforce, Employees, Movements, and Exits. The main content area is titled 'ADMINISTRATION DAILY SUMMARY Daily summary groups'. It includes a search bar, a 'Quick Links' dropdown, and a user profile for Meera Iyer. A 'Read a digest' button is also present. A blue banner explains the difference between a summary (asking 'what somebody did') and a timesheet (asking 'how many hours went where'). Below this is a table of existing groups:

GROUP	ASKED	PEOPLE	DIGEST TO	
Engineering standup What did you work on today, and what is in your way?	17:30 Mon Tue Wed Thu Fri	6	Each person's manager	Edit Delete

To the right is a 'NEW GROUP' form with the following fields:

- Group name ***: Text input with placeholder 'e.g. Engineering standup'.
- The question ***: Text input with placeholder 'What did you work on today?'. Below it, a note says 'Shown as the field label people answer under'.
- Ask at**: Time picker set to '05:30 PM'. Below it, a note says 'The scheduler runs hourly, so this is the earliest it goes out'.
- Days it is asked**: Radio buttons for Mon, Tue, Wed, Thu, Fri, Sat, and Sun. Mon, Tue, Wed, Thu, and Fri are selected.
- Digest goes to**: Dropdown menu set to 'Each person's own manager'. Below it, a note says 'Anyone with the permission can open a digest; this is who it is meant for'.
- Who is asked**: Section titled 'Everybody selected here gets the question on the days above.' with a list of employees: Aditya Verma - NW1016, Ananya Krishnan - NW1005, Arjun Rao - NW1002, Daniel Fernandes - NW1008, Fatima Sheikh - NW1007, and Imran Qureshi - NW1012. Each has an unchecked checkbox.
- Ask this question**: A checked checkbox.
- Create group**: A green button at the bottom.

The footer of the page reads 'XcodeFix HRMS v1.0.0 Privacy Policy Terms of Service'.

Administration → Daily summary. Who is asked, when, and who the digest is for.

Write the question in your own words — it becomes the label people answer under, so "What did you work on today, and what is in your way?" gets better answers than "Daily update". Pick the time and the days, then tick the people.

The scheduler runs hourly, so the time is the earliest it goes out, not the exact minute. A question is asked once a day however many times the scheduler runs, so a re-run never double-prompts anyone.

18.2 Reading the digest

The screenshot shows the 'Summary digest' page in the XcodeFix HRMS system. The left sidebar contains navigation links: Home, To Do (6), Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, My Interviews, Refer someone, Performance, Reviews, My Payslips, Tax statement, Tax declaration, Daily summary, Summary digest (selected), Timesheet, Time review, and Recognition. The main content area is titled 'SUMMARY DIGEST Summary digest' and 'Engineering standup · Thursday, 03 Sep 2026'. It features a 'Day' selector for '09/03/2026' and a 'Show' button. Below this, a list of team members is shown with their answers to the question 'WHAT DID YOU WORK ON TODAY, AND WHAT IS IN YOUR WAY?'. The list includes Ananya Krishnan (NW1005), Fatima Sheikh (NW1007), Kavita Menon (NW1003), Rohit Deshmukh (NW1004), Arjun Rao (NW1002), and Vikram Singh (NW1006). Arjun Rao and Vikram Singh are marked 'No answer'. A note at the bottom states: 'People who did not answer are listed too. A digest that only showed the replies would quietly hide the half that is usually more interesting.' On the right, a 'RECENT DAYS' panel shows a summary for the last three days: 03 Sep 2026 (4 / 6), 02 Sep 2026 (5 / 6), and 01 Sep 2026 (5 / 6). The footer includes 'XcodeFix HRMS v1.0.0 Privacy Policy Terms of Service'.

Summary digest. One day, one group, everyone who was asked.

People who said nothing are listed too, marked **No answer**. A digest that only showed the replies would quietly hide the half that is usually more interesting. The panel on the right gives the last fortnight at a glance — four of six one day and six of six the next tells you something.

People can revise an answer for a week, which is long enough to fix a typo in something their manager is about to read and short enough that the record stays honest.

19. Recognition

The screenshot displays the XcodeFix HRMS Recognition module. The sidebar on the left includes options like Home, To Do, Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, My Interviews, Refer someone, Performance, Reviews, My Payslips, Tax statement, Tax declaration, Daily summary, Summary digest, Timesheet, Time review, and Recognition (highlighted). The main content area is titled 'Recognition' and shows a 'Points people have given each other for good work' section. It includes a 'LEADERBOARD' for the period 01 Jan 2026 - 03 Sep 2026, listing employees and their points. Below the leaderboard is a 'RECENTLY GIVEN' section showing recent recognition entries. On the right, there is a 'RECOGNISE SOMEONE' form with fields for 'Who', 'Points', and 'What for', and a 'Send recognition' button. The bottom right shows a 'YOURS' section indicating no points have been received yet.

Rank	Employee	Points
1	Fatima Sheikh (FS)	10
2	Kavita Menon (KM)	10
3	Aditya Verma (AV)	8
4	Ananya Krishnan (AK)	8
5	Arjun Rao (AR)	5
6	Vikram Singh (VS)	5
7	Daniel Fernandes (DF)	3
8	Rohit Deshmukh (RD)	3

Employee	Points	Reason
Aditya Verma (AV)	4	Meera Iyer - 03 Sep 2026: Walked me through the payroll register patiently.
Aditya Verma (AV)	4	Meera Iyer - 03 Sep 2026: Walked me through the payroll register patiently.
Daniel Fernandes (DF)	3	Fatima Sheikh - 10 Aug 2026: Quietly fixed the flaky test suite everyone complained about.
Fatima Sheikh (FS)	10	Vikram Singh - 14 Aug 2026: Ran the interview loop single-handed while we were short.
Vikram Singh (VS)	5	Ananya Krishnan - 18 Aug 2026: Covered the on-call weekend at no notice.
Ananya Krishnan (AK)	8	Rohit Deshmukh - 22 Aug 2026: Caught the pricing bug before it reached production.
Rohit Deshmukh (RD)	3	Kavita Menon - 26 Aug 2026: Wrote the onboarding doc everybody now uses.
Kavita Menon (KM)	10	Arjun Rao - 30 Aug 2026: Walked a frustrated customer through the migration, twice.
Arjun Rao (AR)	5	Meera Iyer - 03 Sep 2026: Stayed late to get the release out without being asked.

Recognition. A leaderboard, a feed of what people thanked each other for, and the form to add to it.

People give each other points with a reason attached. The reason is the part that matters — "Stayed late to get the release out without being asked" is worth reading a year later; "Great work" is not.

Set a monthly allowance. Recognition that costs the giver nothing stops being recognition and becomes noise. The allowance is a setting rather than a fixed number because how generous it should be is a cultural question, not a technical one. Leave it at zero for no limit.

Nobody can award themselves, and somebody who has left cannot be recognised. Points are held as a ledger rather than a running total on the employee record, for the same reason leave balances are: a total nobody can explain is worse than no total.

Recognition is a module of its own, so it arrives switched off. Turn it on under **Administration** → **Modules** when you are ready for it — nothing appears in anybody's sidebar until you do.

20. Drivers and vehicles

XcodeFix HRMS

NORTHWIND TECHNOLOGIES

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My Interviews

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ADMINISTRATION

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Movements

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Designations

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Leave types & policies

Leave policies

Leave allocations

Blocked dates

Holiday calendars

Attendance sheet

Upload attendance

Attendance settings

Helpdesk categories

Documents & folders

ADMINISTRATION DRIVERS & VEHICLES

Drivers & vehicles

Search people, tickets, documents...

Quick Links

M1 Meera Tyer

Drivers & vehicles

Licences, papers, and what expires soon

EXPIRING WITHIN 60 DAYS

WHAT	WHO OR WHAT	REFERENCE	EXPIRES	LEFT
Insurance	KA 51 AC 1120	Force Traveller	28 Aug 2026	Expired
Driving licence	Aditya Verma	KA012020190100234	25 Sep 2026	22 days
Insurance	KA 05 M3 9082	Manuti Ertiga	11 Oct 2026	38 days

DRIVERS

DRIVER	LICENCE	EXPIRES	USUAL VEHICLE	STATUS
Aditya Verma NW3016	KA012020190100234 LMV	25 Sep 2026 22 days	KA 01 HB 4417	Active
Taran Bhatia NW3014	KA012020210100268 HMV	07 Dec 2026 95 days	KA 51 AC 1120	Active
Sneha Joshi NW3015	KA012020200100251 LMV	10 Jul 2027 310 days	KA 05 M3 9082	Active

VEHICLES

REGISTRATION	VEHICLE	INSURANCE	FITNESS	DRIVERS	STATUS
KA 01 HB 4417	Toyota Innova Crysta Car - 7 seats	01 May 2027	08 Oct 2027	1	Active
KA 05 M3 9082	Manuti Ertiga Car - 7 seats	11 Oct 2026	12 Mar 2027	1	Active
KA 51 AC 1120	Force Traveller Van - 14 seats	28 Aug 2026	07 Dec 2026	1	Active

ADD A DRIVER

Employee

Choose someone

Licence number

Class

e.g. LMV, HMV

Licence expires

mm/dd/yyyy

Usual vehicle

None

Status

Active

Notes

Add driver

ADD A VEHICLE

Registration

KA 01 AB 1234

Make and model

Type

Car, van, bus

Seats

Insurance expires

mm/dd/yyyy

Fitness certificate expires

mm/dd/yyyy

Status

Active

Notes

Add vehicle

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Privacy Policy

Terms of Service

Administration → Drivers & vehicles. What expires soon, first — because that is the question somebody actually has.

For a company with drivers, the thing that matters is not the fleet list; it is the expiry date somebody has to chase. A driving licence is a compliance date exactly like a probation date, and so are vehicle insurance and fitness certificates.

The list at the top of the screen puts all three together, within sixty days, soonest first, colour coded — red for expired or within a month, amber for within two. Retired vehicles and inactive drivers drop out of it, so it stays a list of things that need doing rather than a list of everything.

RECORD	WHAT IT HOLDS
Driver	An employee, their licence number, class and expiry, the vehicle they usually drive, and whether they are currently active or suspended
Vehicle	Registration, make and model, seats, insurance and fitness expiry

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Vehicles are retired, not deleted. A driver record may still point at one, and who drove what is worth keeping. One person has one driver record — a second is refused rather than silently creating a duplicate licence for the same employee.

21. Engage administration

The screenshot displays the 'Engage groups' administration interface. On the left is a dark sidebar with navigation links: Home, To Do, Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, My Interviews, Refer someone, Performance, Reviews, My Payslips, Tax statement, Tax declaration, Daily summary, Summary digest, Timesheet, Time review, and Recognition. The main content area is titled 'HOME ENGAGE GROUPS Engage groups' and includes a search bar and a 'Quick Links' dropdown. Below the title, it says 'The channels people can post into'. A table lists existing groups:

GROUP	TYPE	WHO MAY POST	POSTS
Company Announcements Official updates from the leadership team.	Announcements	Admins only	2 Remove
Events & Celebrations Birthdays, anniversaries and office events.	Events	Everyone	2 Remove
General Anything the team wants to share.	General	Everyone	2 Remove
Kudos Recognise a colleague who went the extra mile.	Kudos	Everyone	2 Remove

To the right of the table is a 'NEW GROUP' form with the following fields:

- Group name ***: Text input field.
- Group type ***: Dropdown menu with 'General' selected.
- Description**: Text area.
- Who may post ***: Dropdown menu with 'Everyone' selected.
- + Create group**: Green button.

At the bottom of the page, it says 'XcodeFix HRMS v1.0.0 Privacy Policy Terms of Service'.

Administration → Engage groups. Channels, and who is allowed to post in each.

Groups come in four kinds — announcements, general, kudos and events. Set **post permission** to *admins only* for the announcements channel so official notices are not buried, and leave the rest open to everyone. Birthday posts are generated automatically each morning from the dates of birth on employee records.



22. Email and templates

The screenshot displays the 'Email templates' section of the XcodeFix HRMS interface. The top navigation bar includes a search bar, 'Quick Links', and a user profile for Meera Iyer. The left sidebar lists various HRMS features. The main content area is titled 'Email templates' and shows a list of templates categorized by function. Each category has a count of emails and a list of templates with 'Standard wording' and 'Edit' options.

Category	Email Count	Template Name	Description	Standard wording	Edit
ACCOUNT	2 emails	Welcome (organisation admin)	Sent to the person who signs the organisation up, after they verify their email.	Standard wording	Edit
		Password reset	Sent when someone asks to reset their password.	Standard wording	Edit
ONBOARDING	2 emails	Employee invitation	Invites an employee to activate their self-service account.	Standard wording	Edit
		Welcome (employee)	Sent once an employee has activated their account.	Standard wording	Edit
LEAVE	4 emails	Leave applied (to approver)	Tells the approver that a request is waiting for them.	Standard wording	Edit
		Leave approved		Standard wording	Edit
		Leave rejected		Standard wording	Edit
		Leave cancelled		Standard wording	Edit
ATTENDANCE	2 emails	Regularisation requested (to approver)		Standard wording	Edit
		Regularisation decided		Standard wording	Edit
HELPDESK	3 emails	Ticket raised		Standard wording	Edit
		Ticket updated		Standard wording	Edit
		Ticket resolved		Standard wording	Edit
DOCUMENTS	2 emails	Letter request ready		Standard wording	Edit
		New document shared		Standard wording	Edit
ENGAGE	2 emails	Birthday greeting		Standard wording	Edit
		Announcement		Standard wording	Edit

Administration → Email & templates. Eighteen messages, all rewritable in your own words.

Nothing is sent inline. Every message is rendered at the moment it is queued — so editing a template later never rewrites mail already sent — then delivered by a background worker that retries on failure.

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NORTHWIND TECHNOLOGIES

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Helpdesk

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My Payslips

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ADMINISTRATION EMAIL TEMPLATES LEAVE APPROVED

Leave approved

Search people, tickets, documents...

Quick Links

Meera Iyer HR Manager

Leave approved

Standard wording

All templates

PLACEHOLDERS

Click one to drop it into the message. Anything else is sent as written.

{{employee_name}}

{{leave_type}}

{{from_date}}

{{to_date}}

{{days}}

{{approver_name}}

{{note}}

{{balance}}

{{org_name}}

{{action_url}}

{{platform_name}}

{{support_email}}

{{year}}

{{app_url}}

{{brand_color}}

STANDARD WORDING

Subject: Your {{leave_type}} has been approved

You have not changed this email, so it already uses the standard wording.

MESSAGE

Subject line *

Your {{leave_type}} has been approved

Placeholders work here too.

Message body (HTML)

```

<h1 class="h1" style="margin:0 0 14px; font-family:'Segoe UI',Helvetica,Arial,sans-serif; font-size:24px; line-height:32px; font-weight:600; color:#101828; letter-spacing:-0.3px;">Your leave has been approved</h1>
<p style="margin:0 0 22px; font-size:16px; line-height:26px; color:#475467;">Hello {{employee_name}}, your leave request has been approved by {{approver_name}}.</p>
<table role="presentation" width="100%" cellpadding="0" cellspacing="0" border="0" style="margin:0 0 22px; border:1px solid #e7eef4; border-radius:10px; overflow:hidden;">
  <tr><td style="padding:11px 16px; background:#f8f9fc; border-bottom:1px solid #eef1f4; font-size:13px; color:#667085; width:38%;">Leave type</td><td style="padding:11px 16px; border-bottom:1px solid #eef1f4; font-size:14px; color:#101828; font-weight:600;">{{leave_type}}</td></tr>
  <tr><td style="padding:11px 16px; background:#f8f9fc; border-bottom:1px solid #eef1f4; font-size:13px; color:#667085; width:38%;">From</td><td style="padding:11px 16px; border-bottom:1px solid #eef1f4; font-size:14px; color:#101828; font-weight:600;">{{from_date}}</td></tr>
  <tr><td style="padding:11px 16px; background:#f8f9fc; border-bottom:1px solid #eef1f4; font-size:13px; color:#667085; width:38%;">To</td><td style="padding:11px 16px; border-bottom:1px solid #eef1f4; font-size:14px; color:#101828; font-weight:600;">{{to_date}}</td></tr>
  <tr><td style="padding:11px 16px; background:#f8f9fc; border-bottom:1px solid #eef1f4; font-size:13px; color:#667085; width:38%;">Working days</td><td style="padding:11px 16px; border-bottom:1px solid #eef1f4; font-size:14px; color:#101828; font-weight:600;">{{days}}</td></tr>
  <tr><td style="padding:11px 16px; background:#f8f9fc; border-bottom:1px solid #eef1f4; font-size:13px; color:#667085; width:38%;">

```

Preview

Send me a test

Save template

XcodeFix HRMS v1.0.0 Privacy Policy Terms of Service

Editing a template. Only the listed placeholders are available, and a preview renders with sample data.

GROUP	MESSAGES
Account	Welcome (organisation admin), verify email, password reset
Onboarding	Employee invitation, welcome (employee)
Leave	Applied, approved, rejected, cancelled
Attendance	Regularisation applied, regularisation decided
Helpdesk	Created, updated, resolved
Documents	Letter ready, document shared
Engage	Birthday, announcement

XcodeFix HRMS
NORTHWIND TECHNOLOGIES

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Timesheet

Time review

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Engage

ADMINISTRATION OUTGOING EMAIL

Outgoing email

Search people, tickets, documents...

Quick Links

Meera Iyer
HR Manager

Outgoing email

Send your organisation's email through your own mail server

SERVER

SMTP host *
smtp.yourcompany.com

Port *
587

Encryption *
STARTTLS (usually port 587)

Username
Leave blank if your server does not need authentication.

Password
Stored encrypted and never shown again.

SENDER AND LIMITS

From address *
Must be an address your server is allowed to send as.

From name
Northwind Technologies

Hourly send limit *
Anything over the limit waits in the queue rather than being rejected.

Use these settings

Send through this server
Switch off to keep the settings but send through the platform mail server instead.

Test connection

Save settings

DELIVERY SO FAR

Delivered0

Waiting to send0

Sending now0

Retrying0

Given up0

Nothing is sent while you are waiting: messages are queued and delivered in the background, so a slow mail server never slows the portal down.

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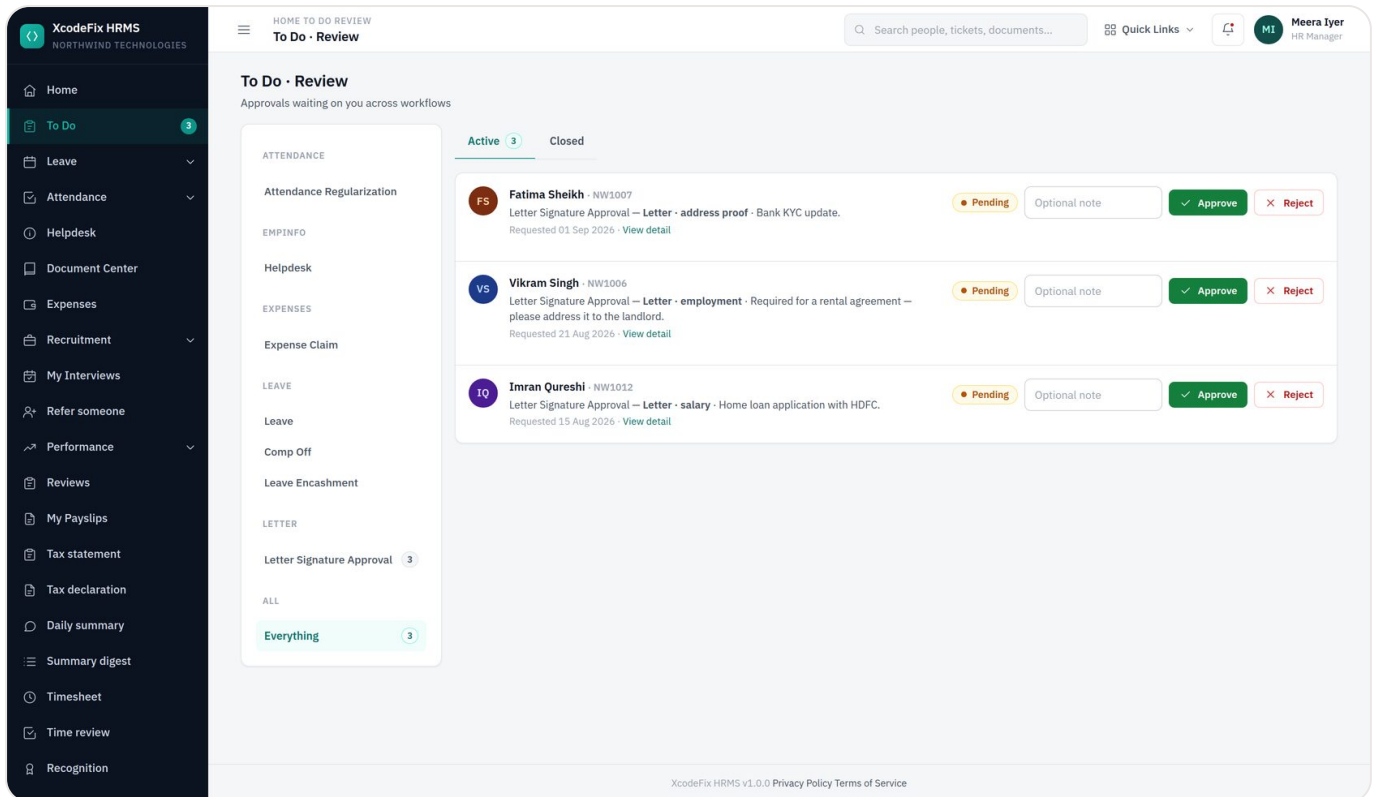
Privacy Policy

Terms of Service

Administration → Outgoing email. Send through your own mail server instead of the platform's.

By default, mail goes out from the platform mailbox. Point it at your own SMTP server if you would rather mail arrive from your domain — credentials are encrypted, and a test message confirms the settings before you commit to them.

23. Your To Do inbox



To Do. Everything waiting on you, grouped by what kind of thing it is.

One inbox for every approval in the product — leave, restricted-holiday requests, attendance corrections, letter requests. The sidebar badge shows the outstanding count. Approve or reject in place with an optional note; the **Closed** tab keeps a record of what you decided and when.

What lands in *your* inbox depends on your role. Managers see requests from their direct reports. HR sees letter requests and anything from people with no manager mapped.

24. When someone leaves

Leaving is a process, not a flag. Somebody works a notice period, hands things over, gets cleared by three or four different people, is paid what they are owed, and only then does their access stop. Each of those is a record here, because each of them is something people ask about afterwards.

24.1 The clearance checklist

ITEM	OWNER	BLOCKING	STATUS
Handover to the team	Reporting manager	• Blocks payment	• Active
Laptop and access card returned	IT	• Blocks payment	• Active
Email and system access closed	IT	• Blocks payment	• Active
Company card and expenses settled	Finance	• Blocks payment	• Active
Exit interview held	People & Culture	No	• Active
Address and contact details confirmed	People & Culture	No	• Active

ADD AN ITEM

Item *

e.g. Laptop and access card returned

Who does it

Free text — "IT", "Facilities", "Reporting manager"

Description

Order

0

☐ Must be done before the settlement is paid

☒ Include on new exits

✓ Add item

Administration → Exit checklist. The template every leaver is cleared against.

Write the list once. Each item has an owner — free text, because "IT", "Facilities" and "Reporting manager" are not roles the product knows about — and a switch marking it **blocking**.

A blocking item stops the settlement being paid. That is the whole reason the checklist exists: paying somebody before the laptop comes back is the mistake it is there to prevent. Use it for things that genuinely have to happen; make the rest non-blocking so nothing is held up over a courtesy.

Each exit gets its own **copy** of the list, so editing the template next month never rewrites what somebody was already asked to clear — and deleting an item here leaves clearances already under way exactly as they were.

24.2 Recording an exit

The screenshot displays the 'Exits' section of the XcodeFix HRMS interface. The left sidebar contains navigation options like Home, To Do, Leave, Attendance, Helpdesk, Document Center, Expenses, Recruitment, My Interviews, Refer someone, Performance, Reviews, My Payslips, Tax statement, Tax declaration, Daily summary, Summary digest, Timesheet, Time review, Recognition, Engage, and Company settings. The main content area is titled 'Exits' and shows a summary of exits. A table lists employees on notice, with columns for Employee, Last Day, Reason, Clearance, and Status. The table shows one employee, Ritu Chauhan, with a last day of 21 Sep 2026, a reason of Resignation, and a clearance status of 2 blocking days. A right-hand panel titled 'RECORD AN EXIT' allows users to record an exit for a specific employee, with fields for Employee, Reason, Resigned on, Last working day, Notice due, and Notice served. The 'Record exit' button is at the bottom of the panel.

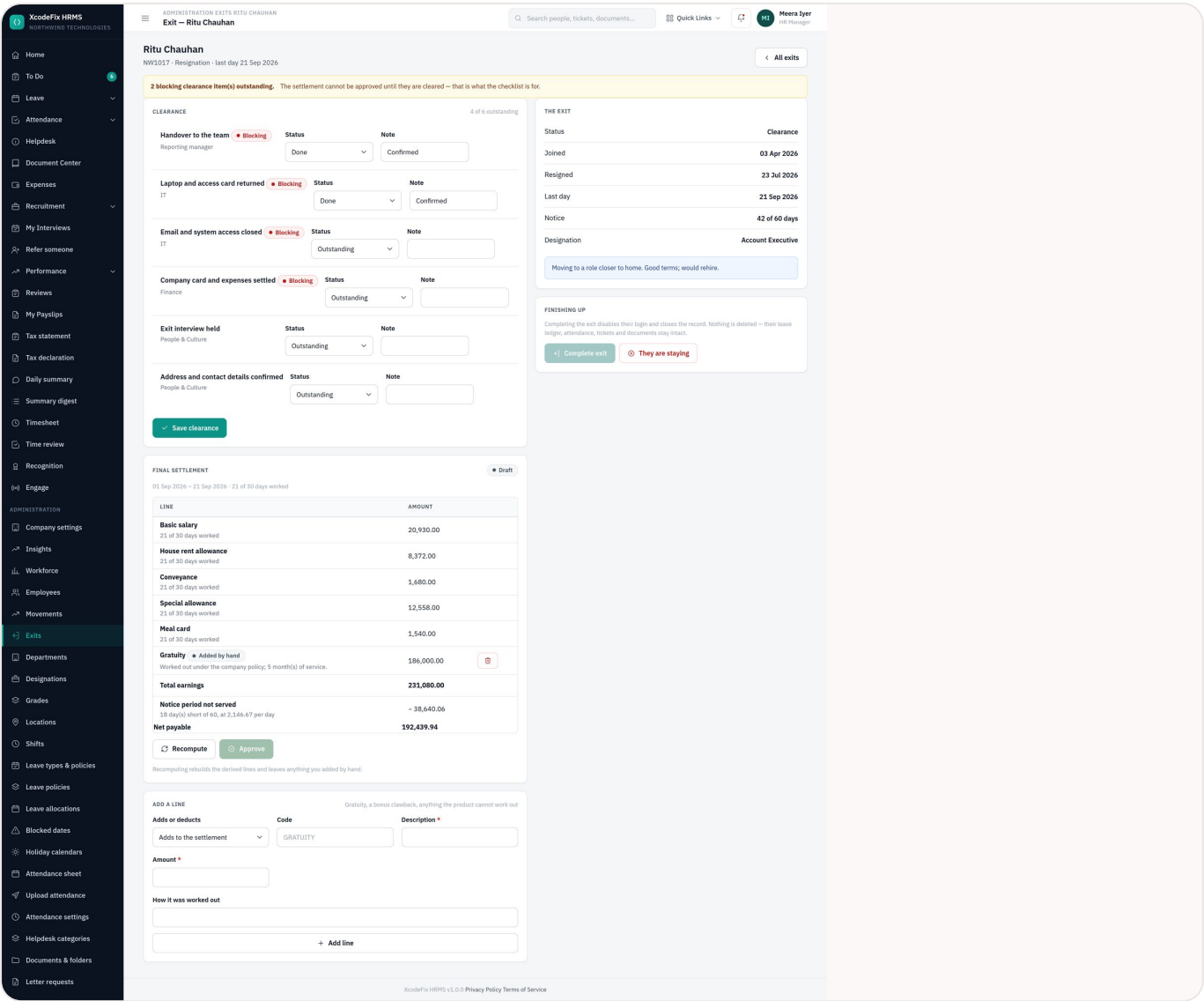
EMPLOYEE	LAST DAY	REASON	CLEARANCE	STATUS
Ritu Chauhan NW1017 - Customer Success	21 Sep 2026	Resignation	2 blocking	Clearance

Administration → Exits. Everyone leaving, and how far through clearance they are.

Record the reason, the day they told you, their last working day, and the notice due against the notice actually served. They move to **on notice** straight away: still employed, still able to sign in, still on the payroll. Nothing stops until you complete the exit.

If they change their mind, cancel the exit. They go back to active and the exit date is cleared. That is a real thing that happens, so it is a button rather than a support request.

24.3 Clearance



One exit. Clearance on the left, the settlement underneath it, and the dates on the right.

Each item can be marked done, left outstanding, or set to **not applicable** — which does not block, and is the honest answer for a laptop that was never issued. Notes are visible to whoever picks the exit up next, which is usually not you.

24.4 The final settlement

A settlement is one person on one date, which is why it is not a payroll run. Folding it into a run would mean either running payroll off-cycle for one leaver or holding their money until month end.

Build works out the part the product actually knows:

LINE	WHERE IT COMES FROM
Salary for the days worked	Their salary structure, pro-rated to the days of the final month they were here. Components marked as not pro-rating are paid in full

LINE	WHERE IT COMES FROM
Leave encashment	Unused days on leave types you allow to be cashed in, at a day's pay — a month's gross over the days in the month. The line says so, so nobody has to reverse-engineer it
Notice not served	The shortfall between notice due and notice served, at the same day rate

Everything else — gratuity, a retention clawback, a goodwill payment, an asset never returned — is a line you add by hand, with a note saying how you worked it out.

Recomputing keeps the lines you added. Correct a leave balance and rebuild, and the derived lines refresh while your gratuity stays exactly where it was. A recompute that silently ate a hand-worked figure would be worse than no recompute at all.

A settlement can come out negative. Somebody who owes a month's notice after working three days genuinely owes the company money, and the product says so rather than quietly showing zero. Recover it separately; nothing is paid out.

Approve, then record the payment with its reference. Approval is refused while a blocking clearance item is outstanding, and the button is disabled until it is cleared.

24.5 Completing the exit

The last step disables their login, ends their sessions, and closes the record.

Nothing is deleted. Their leave ledger, attendance history, payslips, tickets and documents stay intact for audit and statutory purposes. There is no "delete employee" that destroys history, by design — and their payslips remain available to your finance team long after the login has gone.

People who have left appear in **Workforce analytics** under people who left, with their tenure, which is where an attrition conversation starts.

25. Reference

25.1 Permissions at a glance

CAPABILITY	ORG ADMIN	HR MANAGER	MANAGER	EMPLOYEE
View and edit own profile	✓	✓	✓	✓
Apply for leave, raise tickets, request letters	✓	✓	✓	✓
Approve leave and attendance corrections	✓	✓	✓	—
View and manage all employees	✓	✓	team only	—
Invite employees	✓	✓	—	—
Leave types, policies, holiday calendars	✓	✓	—	—
Attendance settings	✓	✓	—	—
Helpdesk categories, documents, letters	✓	✓	—	—
Raise expense claims	✓	✓	✓	✓
Approve expense claims	✓	✓	✓	—
Expense types, mark claims paid	✓	✓	—	—
Refer a candidate	✓	✓	✓	✓
Conduct interviews, give feedback	✓	✓	✓	—
Manage openings, candidates and offers	✓	✓	—	—
Company settings, modules, roles, audit trail	✓	—	—	—
Email templates and outgoing mail	✓	—	—	—

25.2 Employee import template

```
emp_code,first_name,last_name,email,department,designation,location,join_date,manager_email
NW1004,Rohit,Deshmukh,rohit.deshmukh@example.com,Engineering,Engineering Manager,Pune,2024-02-13,kavita.menon@example.com
NW1005,Ananya,Krishnan,ananya.krishnan@example.com,Engineering,Senior Software Engineer,Bengaluru HQ,2024-06-13,kavita.menon@example.com
NW1006,Vikram,Singh,vikram.singh@example.com,Engineering,Software Engineer,Pune,2025-06-13,rohit.deshmukh@example.com
```

25.3 What runs automatically

WHEN	WHAT HAPPENS
Every minute	Queued email is delivered, with retries and back-off
Just after midnight	Yesterday's attendance is rolled up, and the last week is backfilled
Just after midnight	Promotions and transfers whose effective date has arrived are applied
1st of each month	Leave accrues; in January, carry-forward is applied
Nightly	Expired invitations and reset tokens are cleared out
Nightly	Database and uploads are backed up and kept for 14 days
Each morning	Birthday posts appear in Engage

25.4 Glossary

Accrual

Leave being earned over time rather than granted in full on 1 January.

Carry-forward

Unused leave moved into next year, up to a cap.

Grace period

Minutes after shift start within which an arrival still counts as on time.

Regularisation

A request to correct an attendance day, approved by the manager.

Leave policy

A named band of extra days per leave type, granted to people through an allocation.

Allocation

The act of granting a policy to a grade, a person or everyone for a period.

Comp off

A day earned back for working a holiday or a weekly off.

Encashment

Unused leave paid out instead of taken.

Movement

A dated change of placement — promotion, transfer or confirmation.

Claim line

One receipt on an expense claim. The claim total is always the sum of its lines.

Pipeline stage

Where a candidate has got to: applied, screening, interview, offer or hired.

Restricted holiday

An optional holiday the employee chooses, subject to approval.

Session

Half of a working day. Session 1 is the first half, session 2 the second.

Entitled vs enabled

A module must be included in your plan (entitled) and switched on by you (enabled) before anyone can use it.