



Basic Training Course



About

This course takes you through the basics of setting up your organization account in Zoho Payroll, performing core payroll operations and how employees can access their payroll information via the Employee Self Service Portal (ESS)

Who it is for:

People in the Finance or Accounts department who are responsible for the setup, configuration, and maintenance of their organization's payroll process.

Duration: Day One - 2 Hours

Module 1: Introduction to Payroll Basics

What is the Payroll Process?

- Flow of the General Payroll Process

Statutory Compliance Aspects

- Income Tax Statutory
- Components
- Reporting



Module 2:

Introduction and Overview of Zoho Payroll

User Interface and Navigation

- Key Modules
- Notifications and To Do areas

Organization Setup

- Setting up the Organization Profile
- Tax Information
- Pay Schedule
- Statutory Components
- Salary Components
- Importing Prior Payroll

Configuring Pay Schedule

- Working Days Pay
- Day
- First Pay Period



Salary Configuration

- Configuring Master Salary Components
- Creating Custom Salary Components Using
- Salary Templates
- Setting up Payslip Templates

Employees

- Adding Employees
- Bulk Import and Export
- Managing Employees' Personal and Payroll Data



Module 3: Payroll Operations

Processing Pay Runs

- Creating a Pay Run
- Key Sections of the Pay Run Screen
- Applying Loss Of Pay (LOP)
- Applying One Time Earnings and Deductions
- Viewing Employees' Pay Computations
- Skipping Employees
- Pay Run Approval
- Salary Disbursal
- Reverting Pay Runs
- Withholding Salary
- LOP Reversal

Reimbursement Handling

- Reimbursement Components Flexible
- Benefit Plan
- FBP Declaration
- Reimbursement Claim Submission



Duration: Day Two - 2 Hours

Module 4: Subsidiary Payroll Processes

Income Tax Handling

- IT Declaration
- Proof of Investments
- Viewing Employee Investments

Module 5: Loans & Settlements

Loan Management

- Creating Loans
- Disbursing and Tracking Employee
- Loans Recording Repayments

Employee Termination

- Initiating Termination
- Setting up and Running Termination Pay Run
- Generating Full and Final Settlement Docs



Module 6: Payroll Reporting

Payroll Overview

- Employee Salary Statement and Register
- Reimbursements Summary
- Payroll Summary

Statutory Reports (Overview)

- EPF related reports ESI &
- PT Reports
- TDS Reports

Others

- Audit Report
- Payroll Journal

Module 7: Setting up Employee Access

Employee Self Service Portal (ESS)

- Features Available
- Inviting Employees
- Basic Actions
- Mobile App



Summary

- What's New
- Best Practices for
- Administrators What's Next?
- Frequently Asked Questions

