StartERP
AI BUSINESS OS

MODULE GUIDE 7 OF 14

HR and payroll

Employees, attendance and shifts, biometric devices, leave, the monthly payroll and onboarding checklists. Step-by-step instructions for each of the 6 modules, with the real screens you will use.

HR & payroll | Attendance & shifts | Biometric devices | Leave requests & balances | Payroll run & payslips | Onboarding & exit checklists

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How to use this guide

Each chapter covers one module: what it does, how to start in a few steps, and then each of its screens with the steps to follow. The label under each module name says whether every store has it or whether it is an add-on module switched on for your store.

Where to find what your store has. Open **Settings** → **Modules** to see the modules your store has. Every screen has a **?** button at the top with the steps for that screen, and the ⓘ beside a title explains what the screen shows.

About the screenshots. They come from StartERP demo stores (starterp.org/#/demo-store) for a Saudi trading business, so the names and figures are sample data. Your screens show your own company, products and figures, and some words change to suit your business.

The modules in this guide

Module	What it gives you
HR & payroll Add-on	Employees and monthly salaries
Attendance & shifts Add-on	Shifts and a roster with each person's weekly rest days; check-in and check-out from the staff's phones inside the store's location, from a kiosk tablet with a PIN, or from a fingerprint device's file; late, early and overtime by the country's labour law (night, rest day and public holiday rates you can change), Ramadan hours and public holidays; corrections with the reason kept; a monthly sheet, an hours and overtime report with the pay it adds, and Kuwait's daily hours file for Ashal

Biometric devices Add-on	Your fingerprint, face and card devices send every punch on their own: ZKTeco and every ADMS brand (eSSL, Realtime, Identix, Biomax, FingerTec, Timmy) with their cloud push setting, Hikvision, BioStar, BioTime, Dahua, Matrix COSEC, IDEMIA, door phones, access systems and any software by a webhook with its own secret token, StartERP fetching from BioTime, BioStar, Hikvision, Dahua or Anviz, an agent on an office PC, or an exported file; each device number goes to the right person and onto the attendance day, numbers nobody has wait until you give them to someone, you see which device is online, and ZKTeco devices take commands from StartERP. Needs Attendance & shifts
Leave requests & balances Add-on	Leave types from your country's labour law (annual, sick in its pay tiers, maternity, paternity, Hajj once in service, marriage, bereavement, unpaid), all of them yours to change; balances earned through the year, more after five years of service, carried into the next year up to a cap, and opening balances with their reason; staff ask from their phone in three taps and see what is left; days counted without rest days and public holidays, half days, the service each type needs; HR or the manager decides, or your approval policy when you have Workflows & approvals; a team calendar of who is away and approved leave on the attendance board
Payroll run & payslips Add-on	One payroll run a month worked out for you: the pay on each employee's record, part months for joiners and leavers, absences and overtime from Attendance & shifts, unpaid and partly paid leave from Leave requests, one-off bonuses and fines, and advances recovered; your country's social insurance and pension (GOSI, GPSSA, SPF, GRSIA, SIO, PIFSS, EPF and ESI, with your own rates where they differ), professional tax and the monthly end-of-service provision; flags for missing IBANs or IDs and pay that moved since last month; HR approves, or your approval policy when you have Workflows & approvals; posting to the ledger, the WPS / Mudad / ECR and bank files, one salary payment per employee, and payslips staff open on their phone

Onboarding & exit checklists Add-on	A checklist for every joiner and every leaver, made from your country's steps: the contract, Qiwa, GOSI, MOHRE, the work permit or the residence, the bank account for the salary, medical insurance, equipment and system access, the induction and the probation review; and for leavers the letter, the handover, the assets back, access closed, the permits cancelled and the final settlement. Each task goes to HR, the manager, IT, finance or the employee with a due day counted from the start or the last day; everyone ticks their own tasks on their phone, overdue ones stand out, and the final settlement is estimated from the end-of-service rules, the leave left and the advances owed

01

HR & payroll

Add-on module

Your team and payroll, sorted

Keep employee records with iqama and contract details and run monthly salaries with allowances and deductions. Salaries flow into your expenses and profit automatically.

What you get

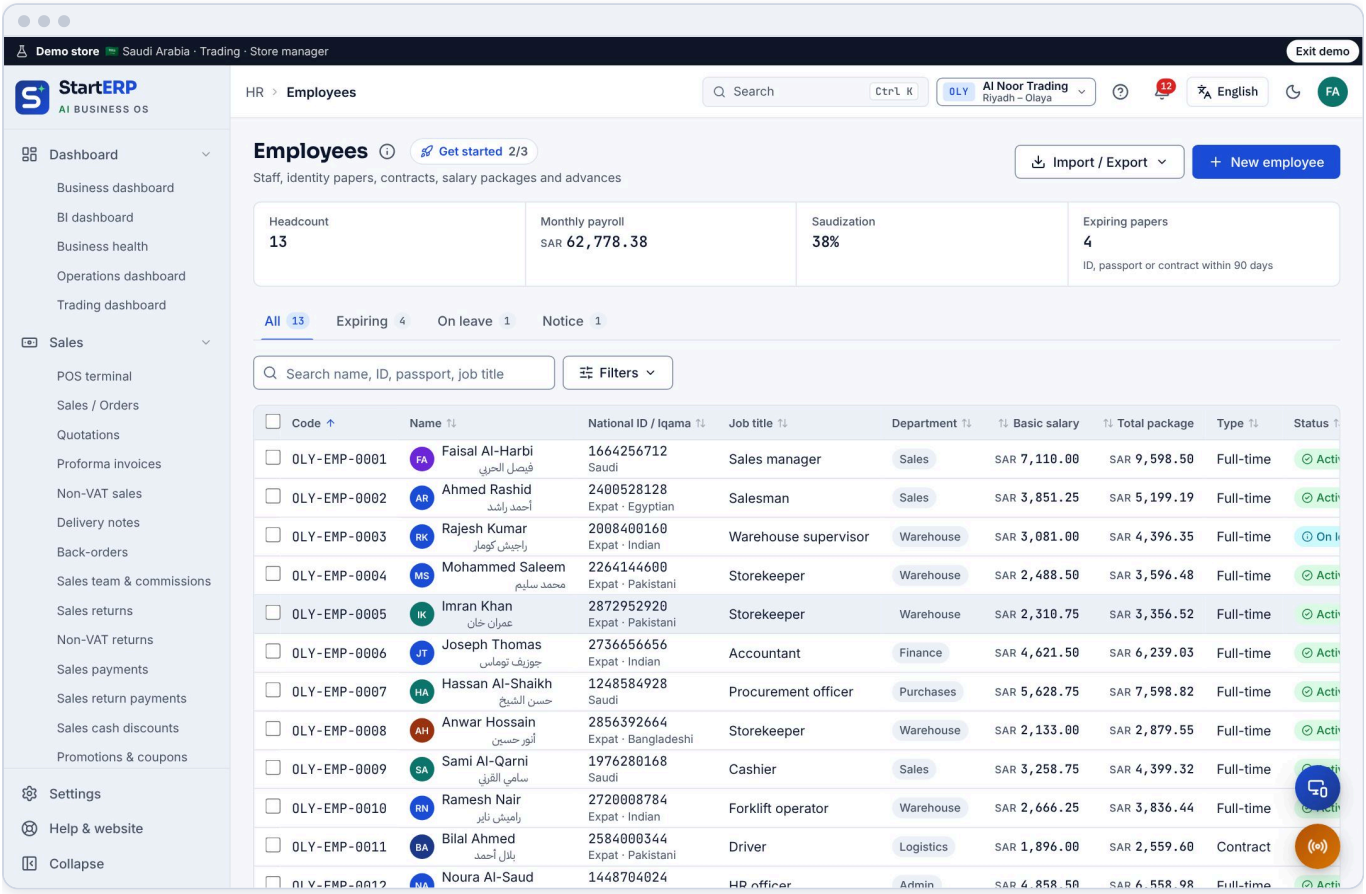
- Employee files with documents and expiry dates
- Monthly salaries with allowances and deductions
- Salary slips to print or share
- Payroll cost in your profit figures

GET STARTED IN 3 STEPS

1. **Add an employee.** Contract, ID papers and pay.
2. **Pay the salary.** Allowances and deductions included.
3. **See it in your profit.** Salaries flow into expenses by themselves.

Employees

Keep each employee's record for the store's country: the identity numbers of that country (National ID or Iqama, Emirates ID, QID, CPR, civil ID, PAN), passport, contract, job, salary package, bank details for wage protection, status and advances. Expiring papers are flagged 90 days ahead.



Employees

ON THE LIST

1. Click "New employee" to add a staff member.
2. Use the Expiring, On leave and Notice tabs: Expiring lists everyone whose ID, passport or contract ends within 90 days.
3. Search by name, ID, passport or job title.
4. Filter by Department, Type, Contract, Nationality (the country's nationals or expats) or Status.
5. Use the row menu "Pay salary" to open a salary payment for that employee.

Tips. "Monthly payroll" totals the package of active employees only; staff on leave or notice are not counted. The nationalisation tile ("Saudization", "Emiratisation", "Omanisation"…) is the share of employees whose nationality is the store's country. A Saudi record without a nationality is read from its ID (1 = Saudi). "Total package" = basic + housing + transport + other allowances.

ON THE FORM

1. Fill "Personal details": names in English and Arabic, nationality, phone, email and status (Active, On leave, Notice period or Exited).
2. Fill "Identity": the papers of the store's country. Saudi Arabia asks for the National ID / Iqama and border number; the UAE for the Emirates ID, MOHRE person number, labour card, visa file number and UID; Oman the civil number; Qatar the QID; Bahrain the CPR; Kuwait the civil ID; India the PAN, UAN, ESIC number and the last 4 digits of Aadhaar. Add the ID expiry date and the passport with its expiry.
3. Fill "Employment and contract": job title, department, cost centre, who the employee reports to, employment and contract type, join date, probation end, contract end and notice period.
4. Enter the monthly salary: basic salary plus housing, transport and other allowances.
5. Fill "Salary payment": payment method, bank and IBAN (account number and IFSC in India; the WPS agent routing code in the UAE).
6. If the employee had an advance before the system, enter it under "Opening balance (advance before system)". Add a photo if you like and press Save.

Tips. The date cannot be in the future: it says when the sale, purchase, payment or entry happened, so the picker stops at now in your store's time (a few minutes of leeway for a device clock that runs fast). Due dates, valid-until, expected delivery and bookings can still be later. A green badge (the country's nationals) or a blue Expat badge with the nationality appears once a valid identity number is entered. Changing salary components here affects new salary payments only, not ones already saved. A debit opening balance opens account 1150 Employee advances in the chart of accounts.

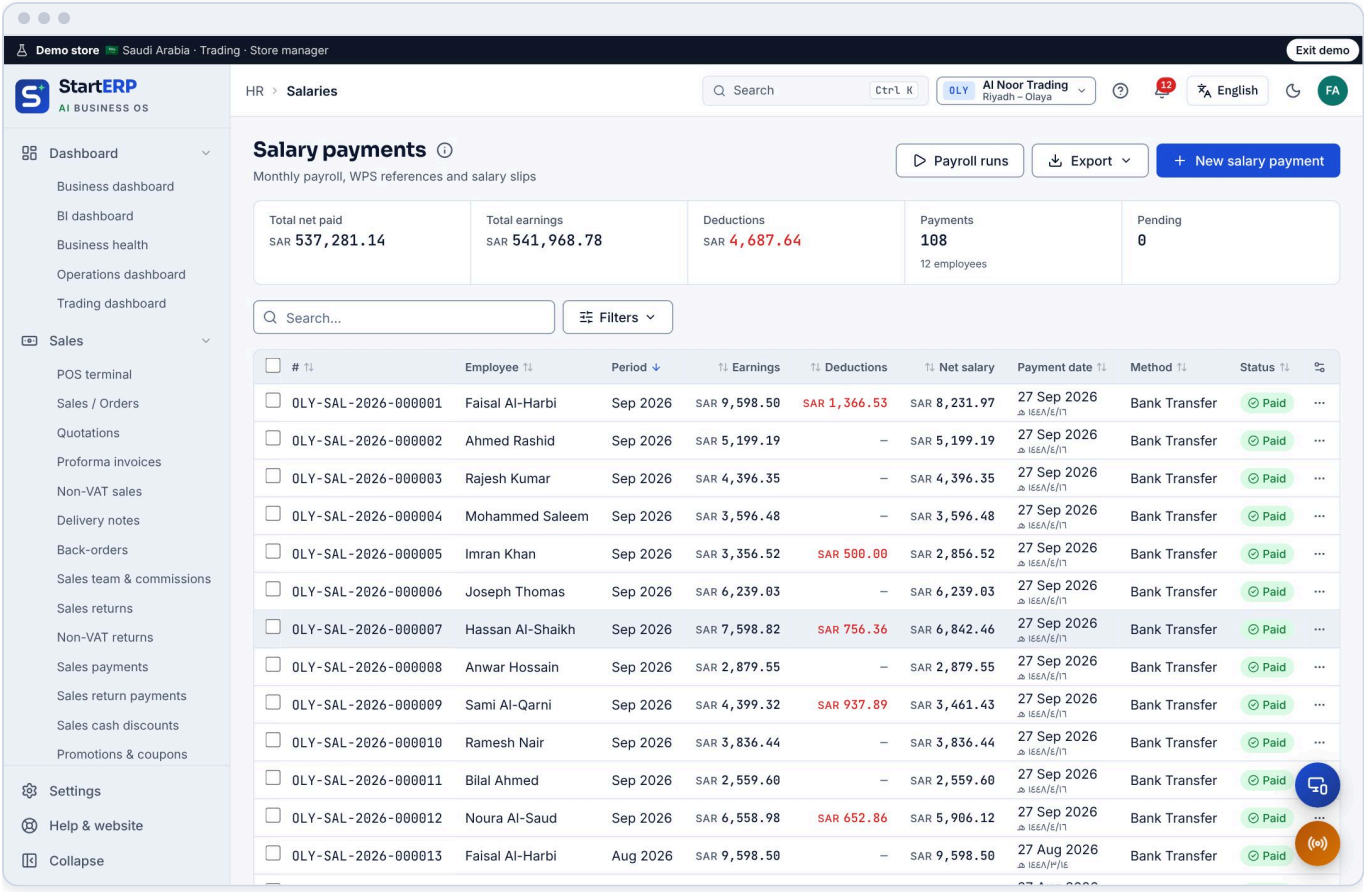
ON THE RECORD

1. Review the badges under the name: status, nationality and any paper expiring within 90 days (ID, passport or contract), then "Monthly package", "Advance balance", "Paid this year" and "Tenure".
2. The Overview shows "Identity and passport", "Employment and contract" and "Salary payment" (bank, IBAN and WPS details) next to the salary components.
3. Open "Documents" to see the papers filed for this employee in Document management, with their expiry badges, or press "File a document" to add one.
4. Click "Record advance", enter date, amount and reference, then Save to give a salary advance; "Pay salary" creates this month’s salary payment.
5. Open "Salary history" for all payments, and "Balance sheet" for advances versus deductions.

Tips. Advance balance = opening balance + advances given − advances deducted from every salary, earlier years included (one "Advance deducted in earlier salaries" line on the advances statement). Positive means the employee owes the company. The Documents tab appears when the store has the Document management add-on. An advance posts Dr 1150 Employee advances / Cr 1000 Cash.

Salary payments

Pay salaries per employee per month: earnings minus deductions minus advance recovered, with WPS references, salary slips and a bulk monthly payroll run.



Salary payments

ON THE LIST

1. Click "New salary payment" to pay one employee.
2. Or click "Run payroll for month", choose Period, Payment date, Method and Status, then "Create N payments". With the Payroll run & payslips add-on the button reads "Payroll runs" and the month is run there.
3. Tick "Recover advances (up to 20% of basic)" in the payroll run to deduct outstanding advances automatically.
4. Filter by Month, Employee or Status.
5. Select pending rows and use "Mark as paid" to settle them together.
6. Use the row menu "Print salary slip" to print a slip.

Tips. With “Custom payment account” on in Settings, a cash or bank payment can go to any account you pick (search, filter by type, or open a new one) instead of Cash or Bank. Leave it on the default to keep using Cash or Bank. The payroll run includes active employees only and skips anyone already paid for that month ("Already paid"). After a payroll run, use Undo in the message to remove all created payments at once. "Deductions" in the list = penalties + advance deducted.

ON THE FORM

1. Choose the Employee; basic salary and allowances fill in from the employee record.
2. Choose the Period (month); payment date and the WPS reference update with it.
3. Adjust earnings if needed; "Total allowances" and "Total earnings" are calculated.
4. Enter "Deductions (penalties, absences)" and "Advance deducted"; "Recover all" fills the outstanding advance.
5. Set Payment date, Payment method, Reference and Status (Paid or Pending).
6. Check the "Net salary" in the summary and press Save.

Tips. The date cannot be in the future: it says when the sale, purchase, payment or entry happened, so the picker stops at now in your store's time (a few minutes of leeway for a device clock that runs fast). Due dates, valid-until, expected delivery and bookings can still be later. When editing, the advance already deducted on this payment still counts as available to deduct. Posting: Dr 5100 Salaries & wages / Cr Cash or Bank for the net; the advance part posts Dr 5100 / Cr 1150 Employee advances. A pending salary credits 2200 Salaries payable instead of cash or bank.

ON THE RECORD

1. Review Total earnings, Deductions and Net salary.
2. If the payment is pending, click "Mark as paid" in the banner once it is paid.
3. Click "Print slip" for a bilingual salary slip.
4. Send the slip with "WhatsApp" or "Email", or open the Employee.

Tips. Deleting a salary payment restores any advance it deducted to the employee balance. The slip shows earnings, deductions and the net salary in words in Arabic and English.

02

Attendance & shifts

Add-on module

Know who came, when, and what the overtime costs

Set up your shifts once, then give each person a shift and their weekly rest days on the roster. Staff check in and out from their phone, which only works inside your store's location, or from a tablet at the door with a 4 to 6 digit PIN; a fingerprint device's file reads in as well. The Today board shows who is in, who is late and who has not come, live. Late minutes, early leaving and overtime follow your country's labour law: night work, rest days and public holidays at their own rate, shorter hours in Ramadan, all changeable in Set-up. A forgotten check-out is fixed with a correction and its reason, kept on the day for HR and auditors. The monthly sheet gives a letter for every day, the report adds the hours, the overtime and the pay it means by person and department, and stores in Kuwait download the daily hours file for Ashal.

What you get

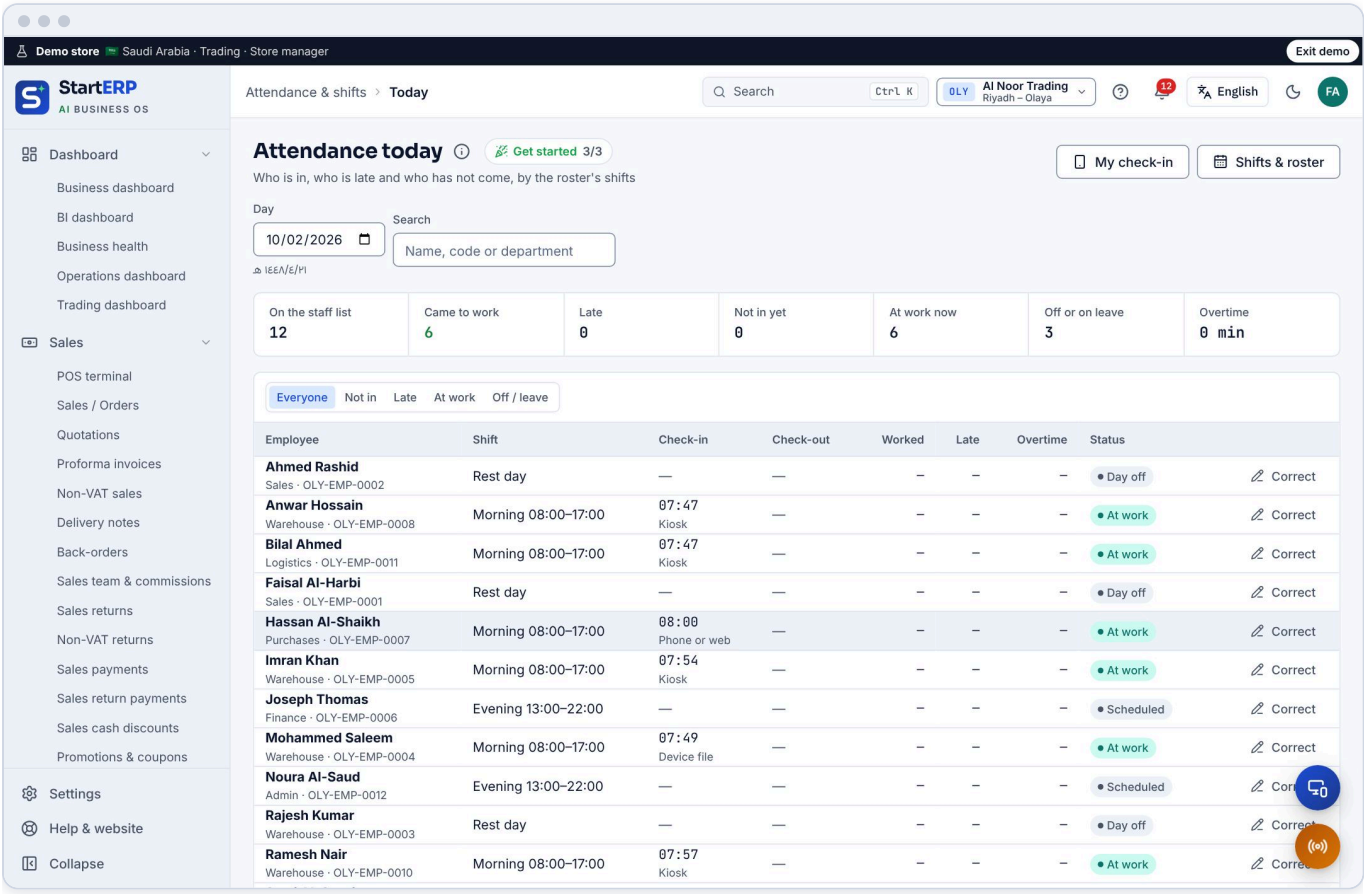
- Shifts and a roster with weekly rest days per person
- Check-in from a phone inside the store's location, a kiosk tablet with a PIN, or a fingerprint device's file
- Late, early and overtime by the country's labour law, Ramadan hours and public holidays
- Corrections with their reason, a monthly sheet, an overtime pay report and Kuwait's Ashal file

GET STARTED IN 3 STEPS

1. **Create your shifts.** Times, grace minutes and rest days.
2. **Fill the roster.** Give each person a shift.
3. **First check-in.** From the phone on site or a kiosk PIN.

Attendance today

See who is in, who came late, who has not come and who is off, by the shifts on the roster. Each row shows the shift, the check-in and check-out with where they came from (phone, kiosk, fingerprint device or a correction), the hours worked and the overtime. Part of the Attendance & shifts add-on.



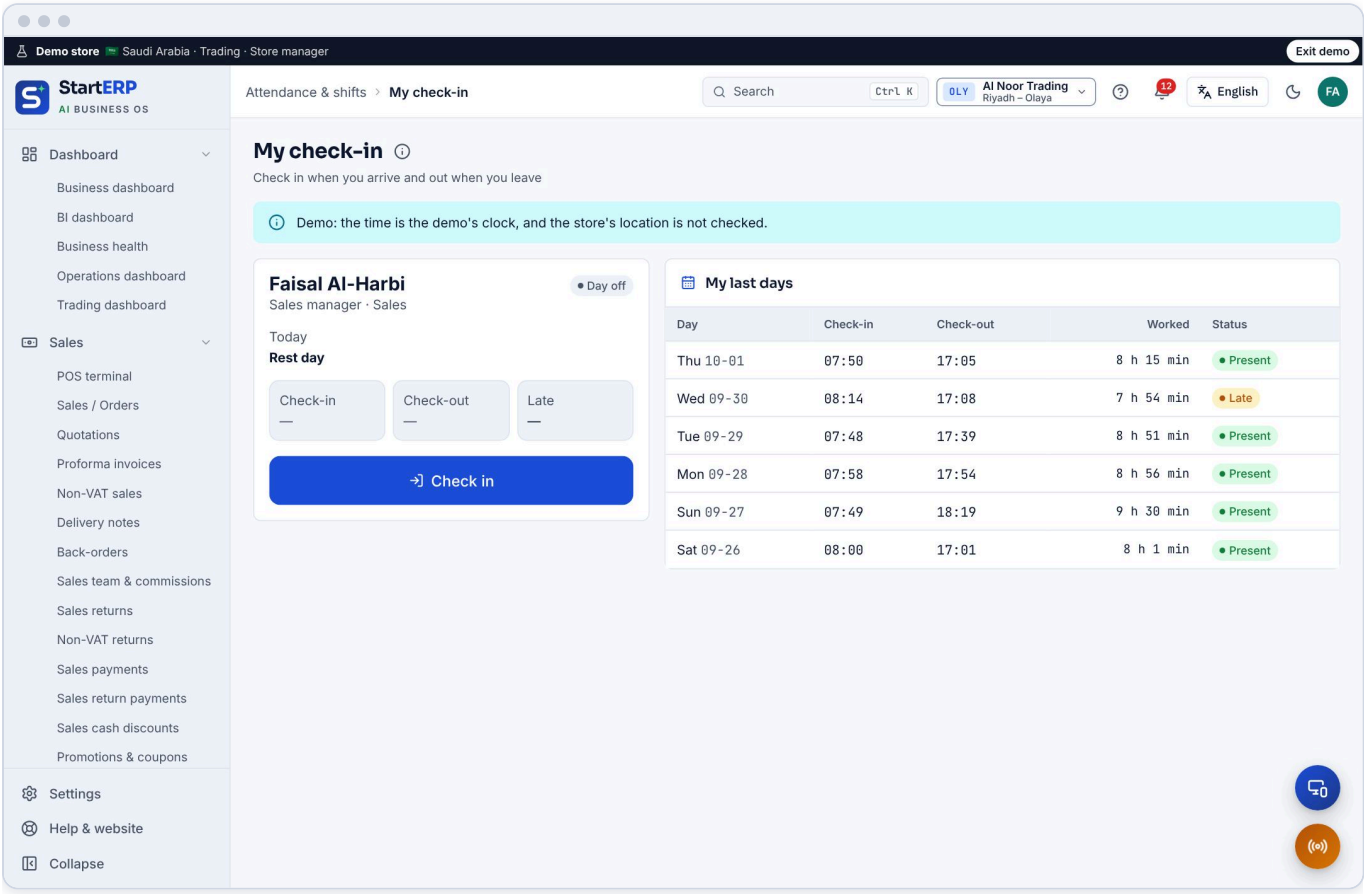
Attendance today

1. Open Attendance & shifts → Today. The top line counts the staff who came, those late, those not in or absent, those at work now and those off or on leave.
2. Pick another day under Day to look back. Use the status buttons and the search to narrow the list, such as Late or a department.
3. Press Correct on a row to put a day right: the check-in and check-out times, or mark it as leave or a day off. A reason is required and is kept on the day with your name.
4. The line under the list gives the overtime rule in use: the extra percent on normal days, at night, on rest days and on public holidays, by your country's labour law unless the store set its own rates.

Tips. A check-in after the shift's grace minutes is late. Someone checked in with no check-out four hours after the shift ends shows Without check-out. Overtime is the time worked beyond the shift, counted in blocks of 15 minutes by default (Set-up changes the block). In a demo store the day runs in your browser on the demo's clock, which starts at 10:30.

My check-in

Check yourself in when you arrive and out when you leave, from your phone or computer while signed in. It shows your shift today, your check-in, check-out and hours, and your last days. The store may allow it only at its location. Part of the Attendance & shifts add-on.



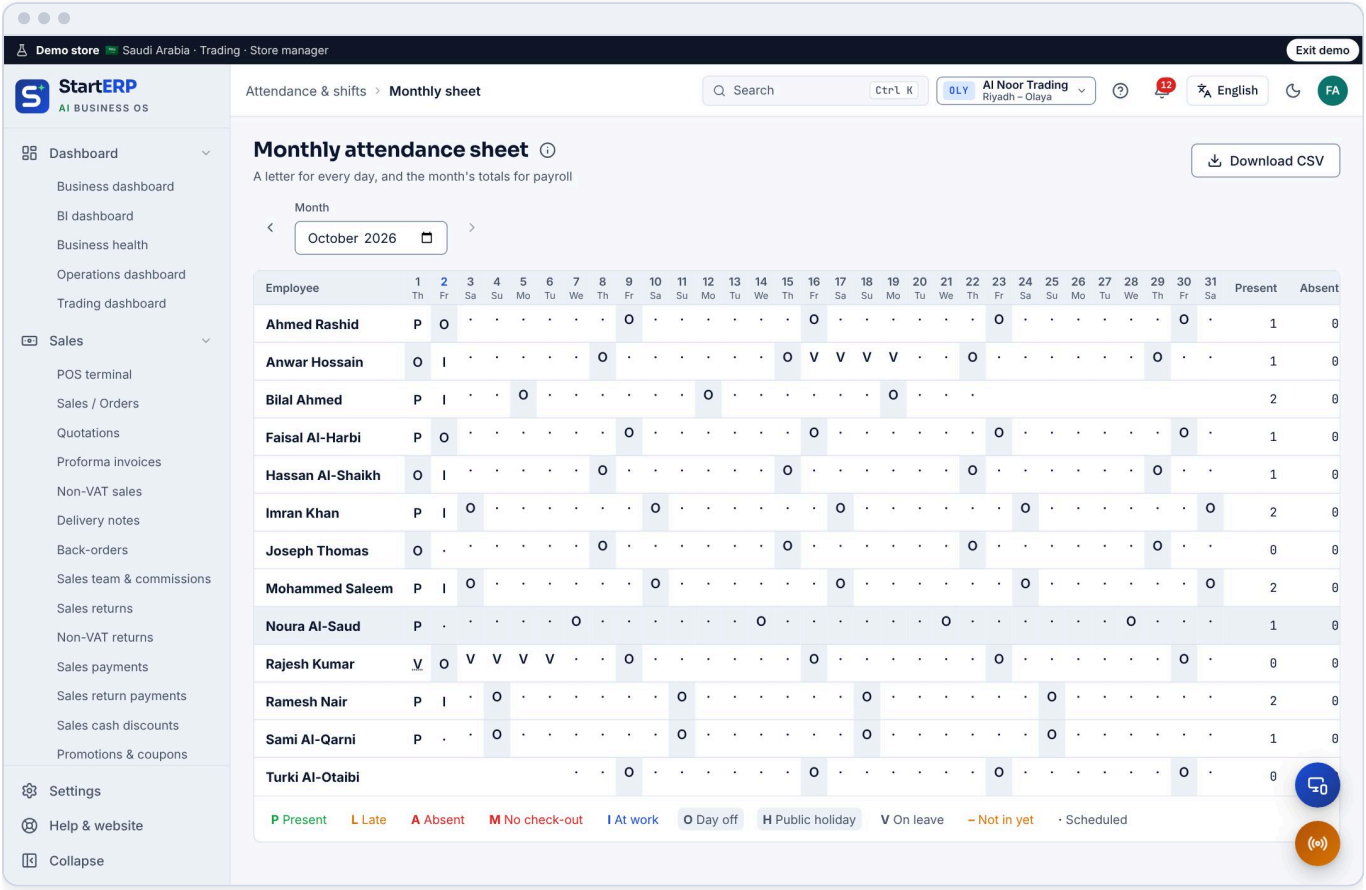
My check-in

1. Open Attendance & shifts → My check-in. Your shift for today shows under your name.
2. Press Check in when you arrive. If the store checks the location, allow your browser to share where you are.
3. Press Check out when you leave. The page then shows the hours you worked and says your day is recorded.
4. My last days lists your check-ins, check-outs and hours of the past days, with any day HR corrected.

Tips. You are not on the staff list yet? HR links your user to your employee record on Attendance set-up → People. A night shift's check-out the next morning closes the day it started on. In a demo store the demo admin is not on the staff list: link your user to an employee on Set-up → People to try it. The location is not checked in the demo.

Monthly attendance sheet

A letter for every employee and every day of the month (present, late, absent, without check-out, on leave, off, public holiday), and the month's totals for payroll: days present, late, absent and on leave, hours worked and overtime hours. Download it as CSV; Kuwaiti stores also get the daily hours for Ashal. Part of the Attendance & shifts add-on.



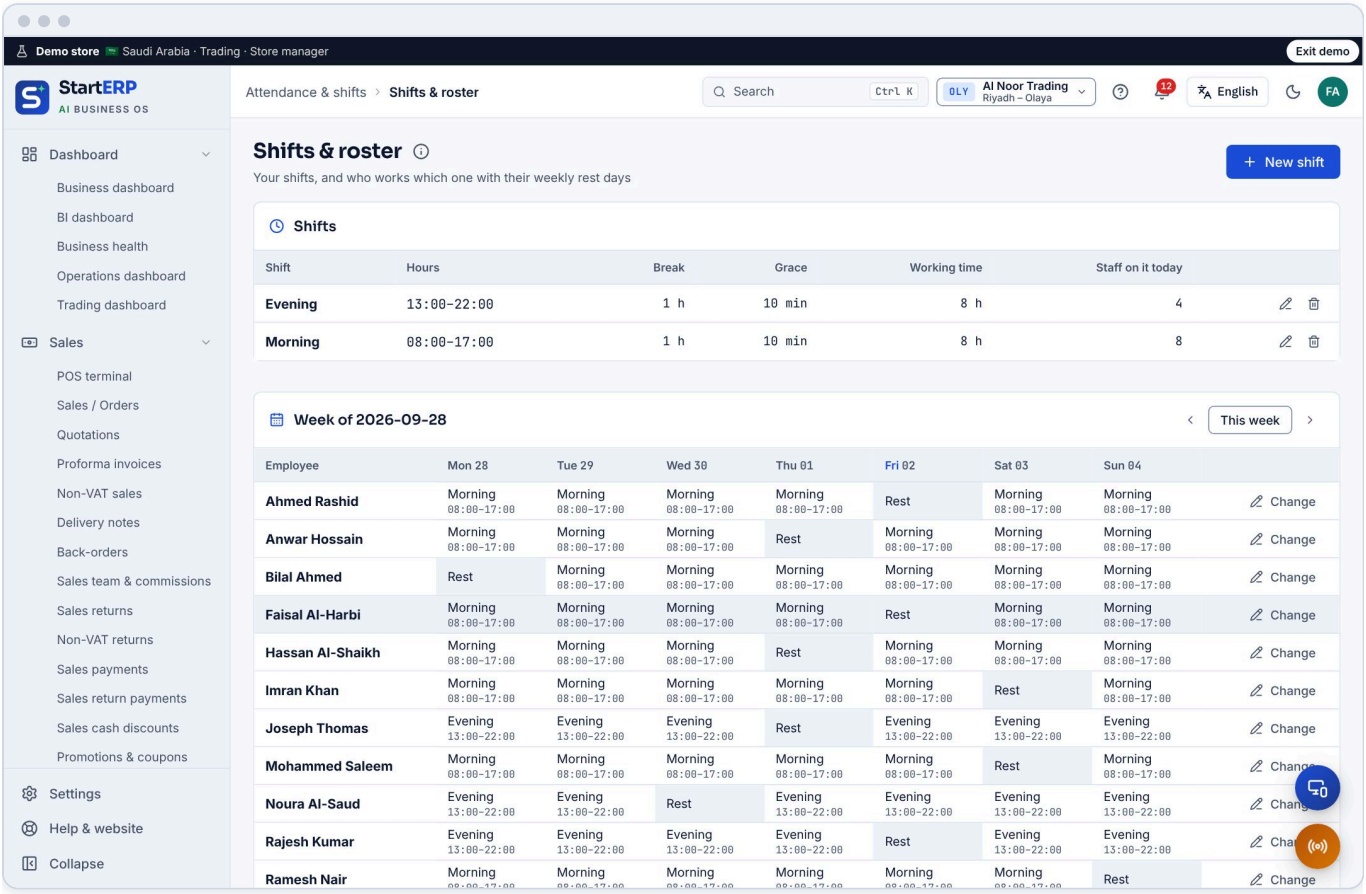
Monthly attendance sheet

1. Open Attendance & shifts → Monthly sheet. It opens on this month; the arrows go to the previous or next month.
2. Read the letters with the legend under the sheet. A dotted letter is a day someone corrected.
3. Press a day's letter to correct it: the times, or leave or a day off, with the reason.
4. Press Download CSV for the month's totals per employee, to pay salaries or overtime.

Tips. The sheet lists everyone employed on at least one day of the month, so someone who joined or left mid-month is there with their days only. In Kuwait, Daily hours for Ashal downloads each employee's hours per day, ready to upload to the Ashal portal.

Shifts & roster

Set the shifts your staff work (start, end, break and the grace minutes before a check-in is late), and who works which shift with their weekly rest days. The week shows each person's shift or day off; a one-day entry covers a swap. Part of the Attendance & shifts add-on.



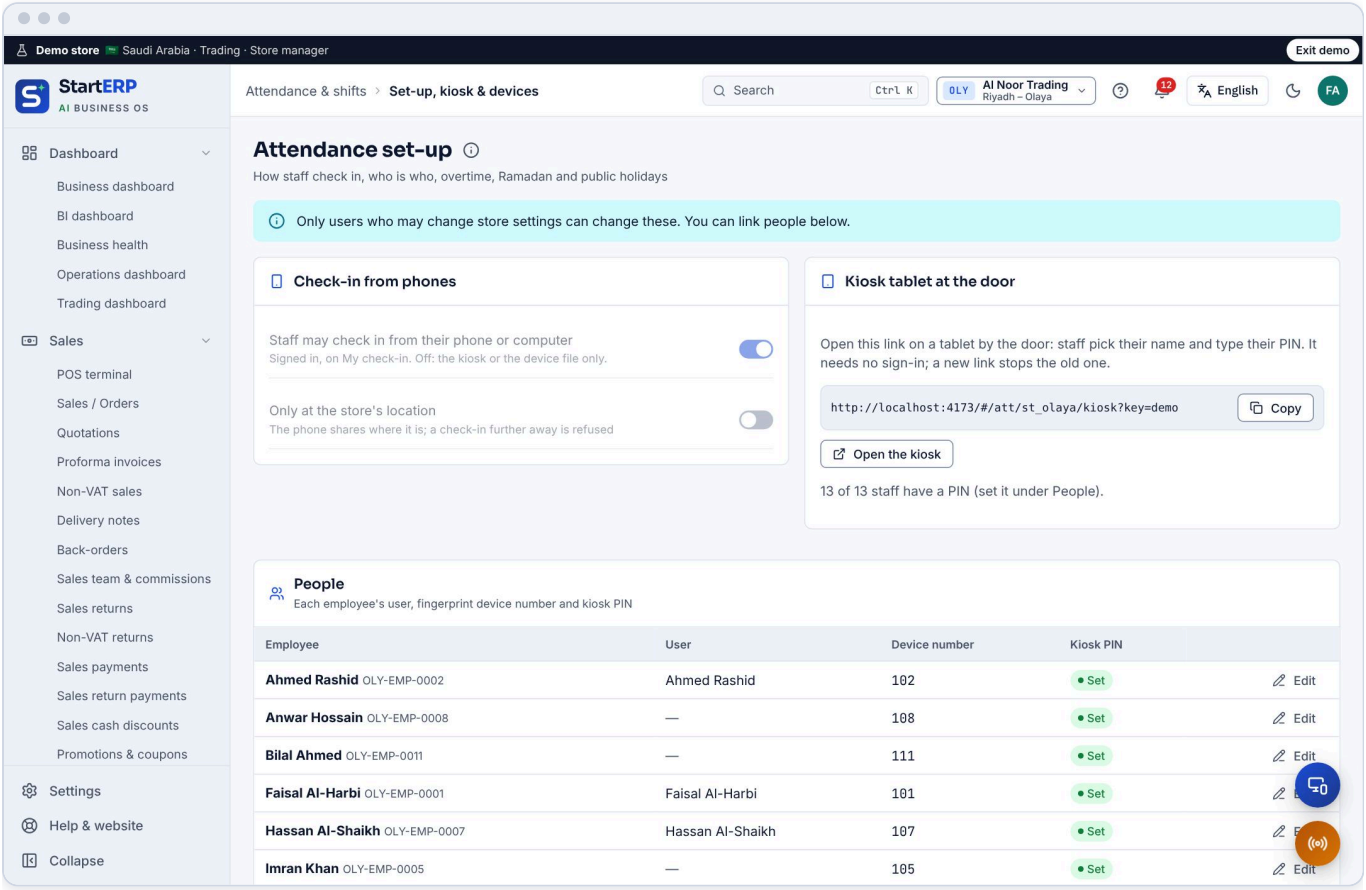
Shifts & roster

1. Open Attendance & shifts → Shifts & roster and press New shift. Give it a name, the start and end, the break in minutes and the grace before late. An end before the start is a night shift that ends the next day.
2. In the week below, press Change on an employee's row. Pick the shift, the first day it applies from and the weekly rest days, then Save.
3. For a one-day swap, set From and Until to the same day. Leave Until empty for an entry that runs until the next one.
4. Use Previous week and Next week to check the coming days: public holidays show on every row.

Tips. A new roster entry applies from its first day; the days before it keep the shift they had, so past attendance does not change. The break is taken off the hours worked once a day passes 5 hours. Staff with no shift on the roster show No shift: their days show no lateness or absence.

Attendance set-up, kiosk & devices

Set how your staff check in: from their phone (only at the store's location, if you wish), on a kiosk tablet at the door with a PIN, or from a fingerprint device's file. Link each employee to their user, device number and PIN, and set the overtime rates, Ramadan hours and public holidays. Part of the Attendance & shifts add-on.



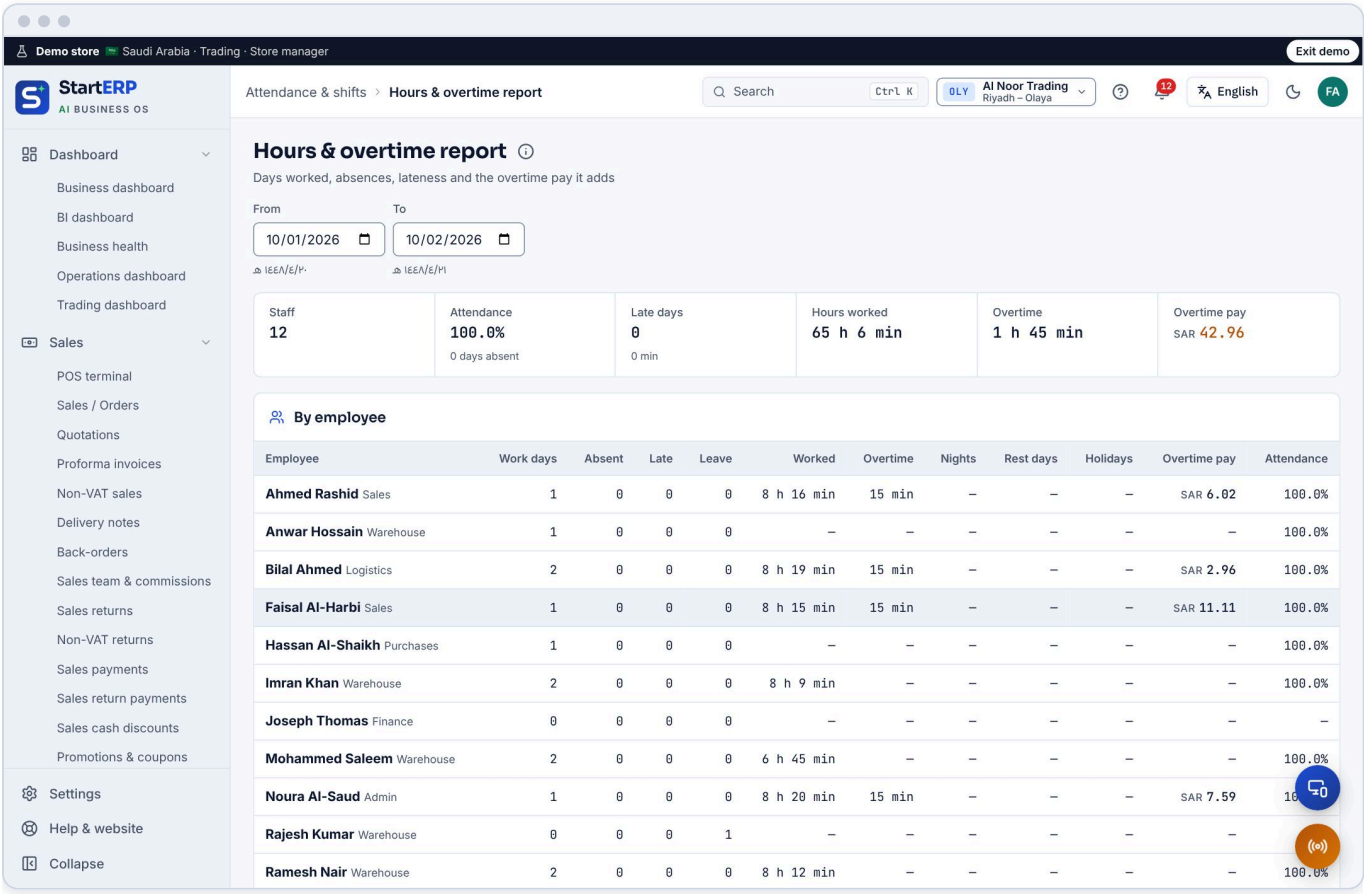
Attendance set-up, kiosk & devices

1. Open Attendance & shifts → Set-up, kiosk & devices. Under Check-in from phones choose whether staff may check in from their phone, and turn on Only at the store's location; press Use where I am now while at the store and set the distance.
2. Under People press Edit on each employee: pick their user (for My check-in), the number they have on the fingerprint device and a kiosk PIN of 4 to 6 digits.
3. Under Kiosk tablet at the door press Open the kiosk on the tablet, or Copy its link. Staff tap their name, type their PIN and are checked in or out, whichever is due.
4. Under Public holidays press Add the national days, and add Eid and the other moon holidays when they are announced. Set Ramadan's dates and how many minutes shorter a day is.
5. Under Fingerprint device file press Choose the file… and pick the CSV or text file the device saved. Each punch checks the person in or out; repeated punches are counted once. Press Save settings when you change the sections above.

Tips. Five wrong PINs lock that person on the kiosk for 15 minutes. New link stops the old kiosk link at once, for when it was shared by mistake. Overtime follows your country's labour law. Turn on Use my store's own rates only when a contract pays more than the law asks. In a demo store the kiosk opens in the same browser tab and every person's PIN is 2580; the location is kept but not checked.

Hours & overtime report

For any period: each employee's work days, absences, late days, hours worked and overtime (on normal days, at night, on rest days and on public holidays) and the overtime pay it adds by the labour law, also by department. Part of the Attendance & shifts add-on.



Hours & overtime report

1. Open Attendance & shifts → Hours & overtime report; it opens on this month so far. Change From and To for another period.
2. The top line shows the staff, the attendance rate, the late days, the hours worked, the overtime and the overtime pay.
3. By employee gives each person's figures; By department adds them up per department.

Tips. Overtime pay is the hourly wage (basic salary ÷ 30 ÷ the shift's hours) times the overtime hours, plus the law's extra percent. The basic salary comes from HR → Employees. The period stops at today: days that have not come yet count nothing.

03 Biometric devices

Add-on module

Punches from the door, straight onto the attendance

Pick your device's brand and StartERP shows exactly what to type in, then tells you the moment it connects. ZKTeco and every ADMS brand (eSSL, Realtime, Identix, Biomax, FingerTec, Timmy, Granding) send every punch on their own with their cloud push setting, and a device already calling from your office shows up ready to add; Hikvision, Suprema BioStar 2, ZKBioTime, Dahua, Matrix COSEC, IDEMIA, 2N and Akuvox door phones and access systems like HID, Honeywell, Bosch, Lenel and Paxton post each punch with a secret token of their own, or StartERP signs in to BioTime, BioStar, Hikvision, Dahua or Anviz CrossChex and fetches the punches every few minutes. Virdi, NITGEN, USB readers and any device that only reaches the office network go through the small StartERP agent on an office PC, and any punch clock's exported file can be uploaded. Settings → Biometric devices holds a guide for every brand, the repeat and offline rules, and an alert when a device goes quiet. Each number goes to the person who has it and onto their attendance day, in the device's own time zone; a punch sent twice counts once and a second punch within 2 minutes is kept aside. From StartERP you send everyone's number and name to a ZKTeco device, set its clock, have it send its log again or restart it.

What you get

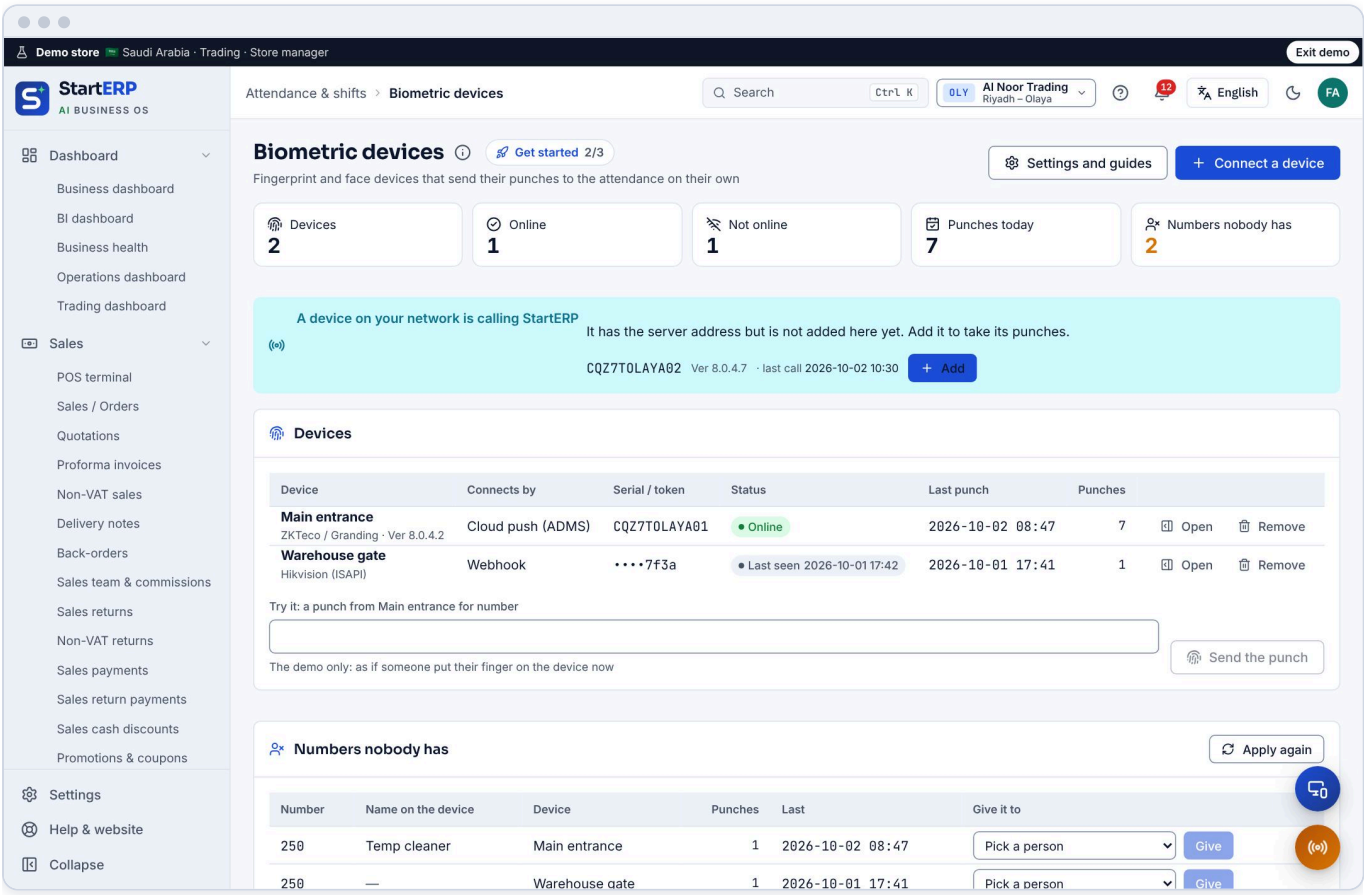
- ZKTeco, eSSL, Realtime, Suprema, Hikvision, Dahua, Anviz, Matrix, IDEMIA, Virdi, HID and more
- A guide for every brand: cloud push, webhook, StartERP fetching, an office-PC agent or a file
- Every number to the right person and onto their attendance day, in the device's time zone
- Commands to ZKTeco devices: send everyone, set the clock, send the log again, restart

GET STARTED IN 3 STEPS

1. **Pick your device brand.** StartERP shows exactly what to type in.
2. **Match staff numbers.** Each device number to its person.
3. **See punches arrive.** They land on the attendance day.

Biometric devices

Connect your fingerprint, face, palm and card devices so every punch reaches the attendance on its own. Pick the brand and the way it connects: ZKTeco and every ADMS brand (eSSL, Realtime, Identix, Biomax, FingerTec, Timmy, Granding) send by themselves (cloud push); Hikvision, Suprema BioStar 2, ZKBioTime, Dahua, Matrix COSEC, IDEMIA, 2N and Akuvox door phones and access systems like HID, Honeywell and Bosch post to a private address with a token, or StartERP signs in and fetches the punches every few minutes; devices that only reach the office network (Virdi, NITGEN, USB readers) go through the StartERP agent on an office PC; and any device's or punch clock's exported file can be uploaded. Each device number goes to the person who has it on Attendance set-up → People, and onto their day. The rules and a guide for every brand are on Settings → Biometric devices. The Biometric devices add-on, used with Attendance & shifts.



Biometric devices

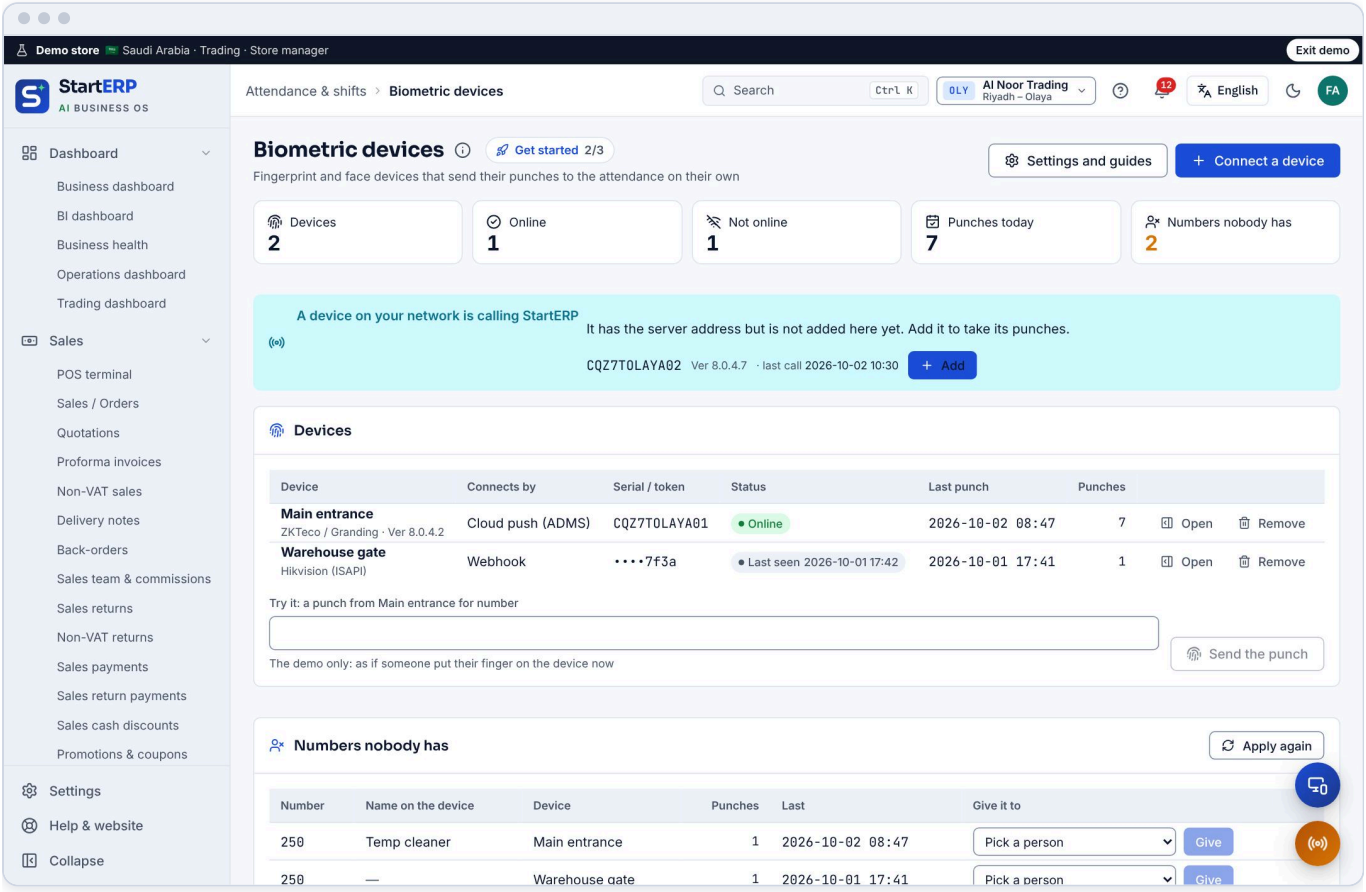
1. Open Attendance & shifts → Biometric devices and press Connect a device. Pick the brand (search by model), then the way it connects: the recommended one is marked, with what it needs.
2. Give it a name and, for a ZKTeco push device, the serial number (Menu → System info → Device info). If the device's clock is not on the store's time, pick the time zone it keeps. For StartERP fetches, enter the address, the username and the password or API secret: it is kept sealed and never shown again.

3. The last step shows what to do on the device and what to type in: the server address and port for ZKTeco, the address and the token (shown once) for a webhook, the agent downloads and the command for an office PC, a Test button for StartERP fetches, or the file upload. A live check shows Connected as soon as the device calls.
4. A ZKTeco device that already calls StartERP from your office shows at the top: press Add and its serial number is filled in. Open a device for its details, its punches, commands (send everyone with a number, set its clock, send its log again for some days, restart, remove a person, clear its log) and troubleshooting with a connection test.
5. Give each person their number on the device on Attendance set-up → People (the employee code and national ID match too). A number nobody has shows under Numbers nobody has: pick the person, press Give, and its punches go on their days.
6. Each punch checks the person in or out by the same rules as the phone and the kiosk; a punch sent twice counts once, a second punch of the same number within the repeat time (2 minutes unless changed on Settings → Biometric devices) is kept as a repeat and not applied, and one with a time still to come waits until Apply again.

Tips. A ZKTeco device is known only by its serial number, so a serial number can be in one store only; remove the device here before you move it to another store. StartERP fetches only from addresses on the internet; an office-network address (192.168…, 10…) is refused, so use the agent on an office PC for those devices. Removing a device keeps the punches it sent and the days made from them. Lost a token? Open the device and press New token: the old one stops at once. In a demo store, Try it sends a punch from the first device as if someone had just used it; the demo cannot reach other servers, so StartERP fetches shows that instead of punches.

Biometric devices settings

Everything about the store's biometric devices in one place: the punch rules, the addresses the devices need, the office-PC agent, a connection guide for every brand and way of connecting, and the list of supported devices. Part of the Biometric devices add-on; a store without it sees the guides and how to add it.



Biometric devices settings

1. Open Settings → Biometric devices. Your devices shows how many are added and online; Open devices goes to the devices page.
2. Punch rules: Repeat punch (a second punch within 1, 2, 5 or 10 minutes is kept aside; Off counts every punch), Offline after (5 to 60 minutes without a call), Fetch servers every (the starting value for new BioTime, BioStar, Hikvision, Dahua or Anviz connections), Show new devices calling from the office, and Alert me when a device goes offline (once per outage, in the notifications and by email).
3. Punch fields: if your device or software names the person's number or the punch time differently, enter its field names; they are tried first in webhooks, the agent and uploaded files.
4. Connection details lists the server address and ports for ADMS devices, the webhook address and token header, a sample punch as JSON and CSV, and the agent downloads.

5. Connection guides: pick the brand (or search a model), then the way it connects. Each guide shows what you need, the steps, what to enter, how to check and what to try; Connect this device opens the connect wizard on that brand and way.
6. Press Save settings to keep the rules.

> **Tips.** Any device not listed works too if it can post its punches to a web address, write a log file on a PC, or export a file. Dates written day first (17/10/2026) and 12-hour times (05:30 PM) are read in files and webhooks.

04

Leave requests & balances

Add-on module

Leave asked, decided and counted, without the spreadsheet

Load your country's leave types in one click: annual leave that grows after five years, sick leave paid in tiers, maternity, paternity, Hajj once in service, unpaid leave, each changeable. Staff ask from their phone and see at once how many working days it counts, skipping the weekend, public holidays and their rest days on the roster, and what they will have left. Their manager or HR approves or rejects with a reason; with Workflows & approvals, your policy decides who signs and in what order. Annual leave is earned day by day, the unused days carry over up to your limit, and opening balances from the old spreadsheet go in with their reason. The team calendar shows who is away on which day before you approve, the balances table shows what each person has left and how it was made up, and approved days show as leave on the attendance sheet.

What you get

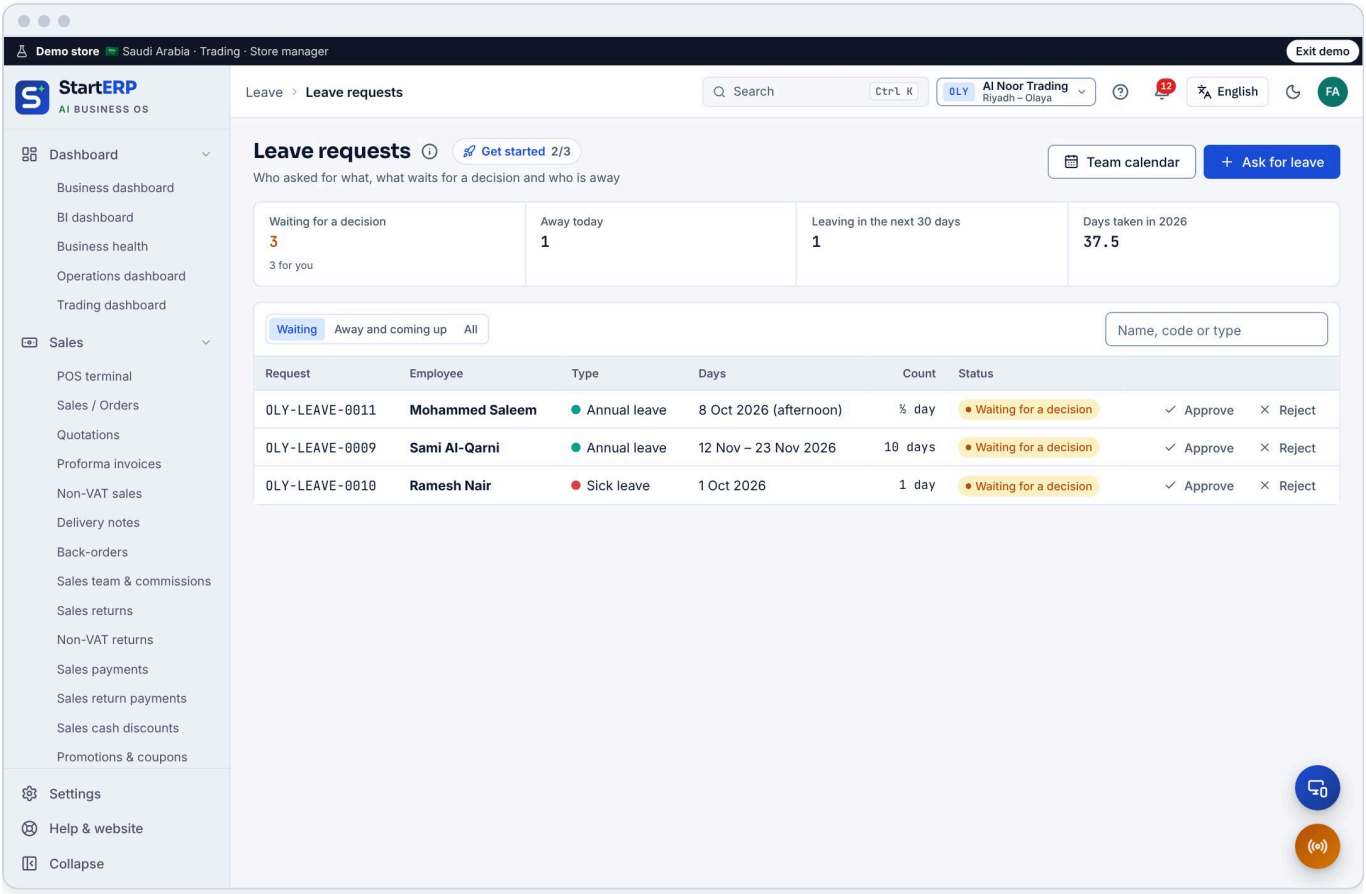
- Your country's leave types: annual, sick in pay tiers, maternity, paternity, Hajj, unpaid
- Requests from the phone with the working days and the balance shown before sending
- The manager, HR or your approval policy decides; the team calendar shows who is away
- Leave earned day by day, carry-over limits, opening balances and a CSV of every balance

GET STARTED IN 3 STEPS

1. **Load your country's leave types.** One click; change any rule.
2. **Request leave.** Staff ask from their phone.
3. **Approve it.** Check the team calendar first.

Leave requests

Who asked for which leave, what waits for a decision and who is away today or soon. HR sees everyone's requests, a manager their team's, anyone else their own. Approve or reject with a reason, cancel leave, or ask for leave for someone. Part of the Leave requests & balances add-on.



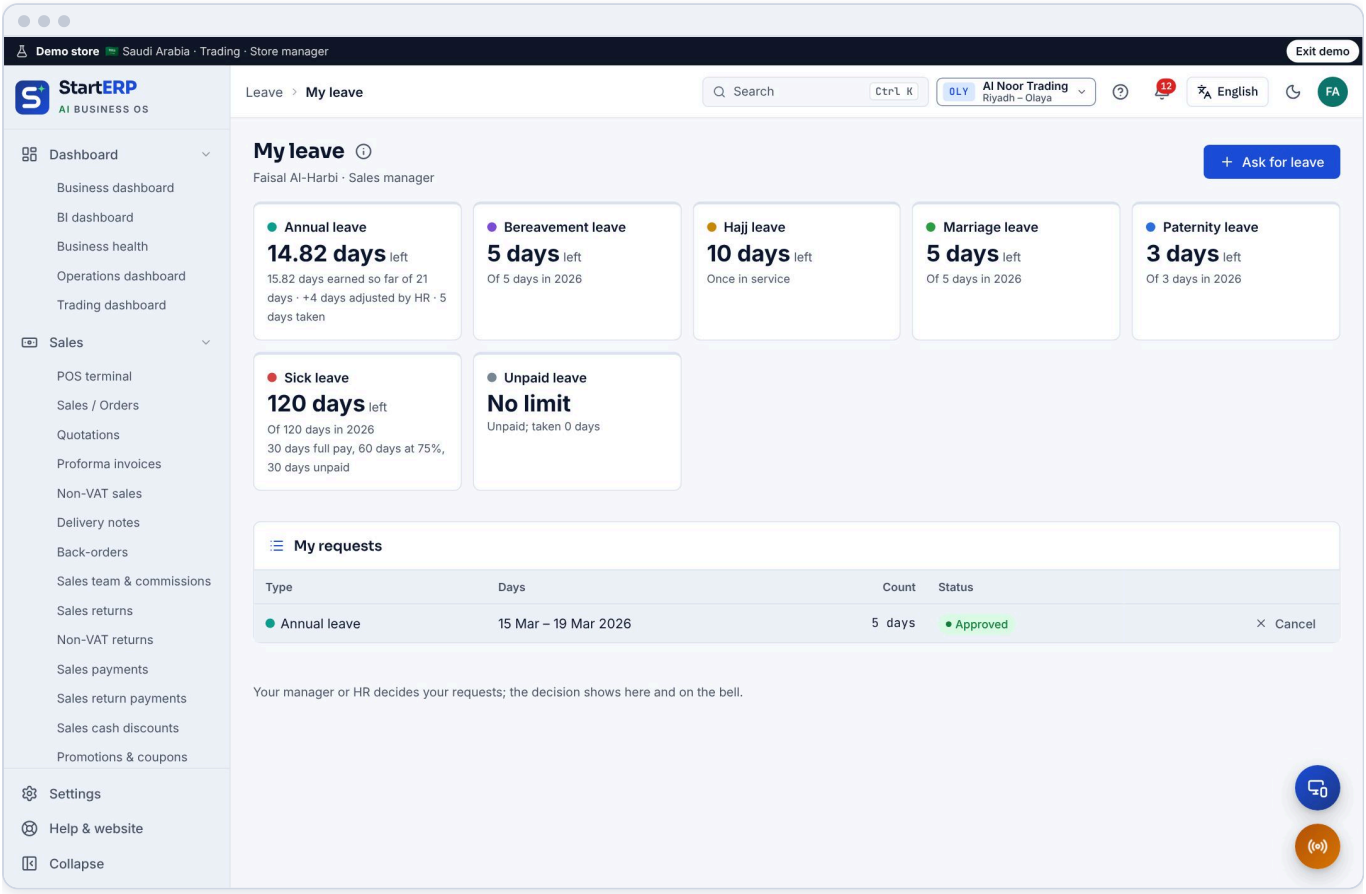
Leave requests

1. Open Leave → Leave requests. The top line counts the requests waiting, who is away today, who leaves in the next 30 days and the days taken this year.
2. The Waiting tab lists the open requests. Press Approve, or Reject and say why: the employee sees your reason on My leave and on the bell.
3. Press a request to open it: the days counted, the pay of each day, the balance left, who asked and who decided. HR can cancel leave here, even once it has started.
4. Press Ask for leave to ask for yourself, or, as HR, for anyone on the staff list. Record as approved is for leave agreed on paper or already taken.

Tips. With Workflows & approvals and a policy for leave requests, the policy decides instead: the request shows Approval and is decided in My tasks, and the decision comes back here. Nobody approves their own leave: the employee's manager or HR does. Leave set-up → Rules says which. Approving checks the balance again, so two requests sent the same week cannot both overdraw it.

My leave

Your balance of each leave type, what you have taken and what waits for a decision, and your requests with their status. Ask for leave from your phone and see how many working days it counts and what you will have left before you send it. Part of the Leave requests & balances add-on.



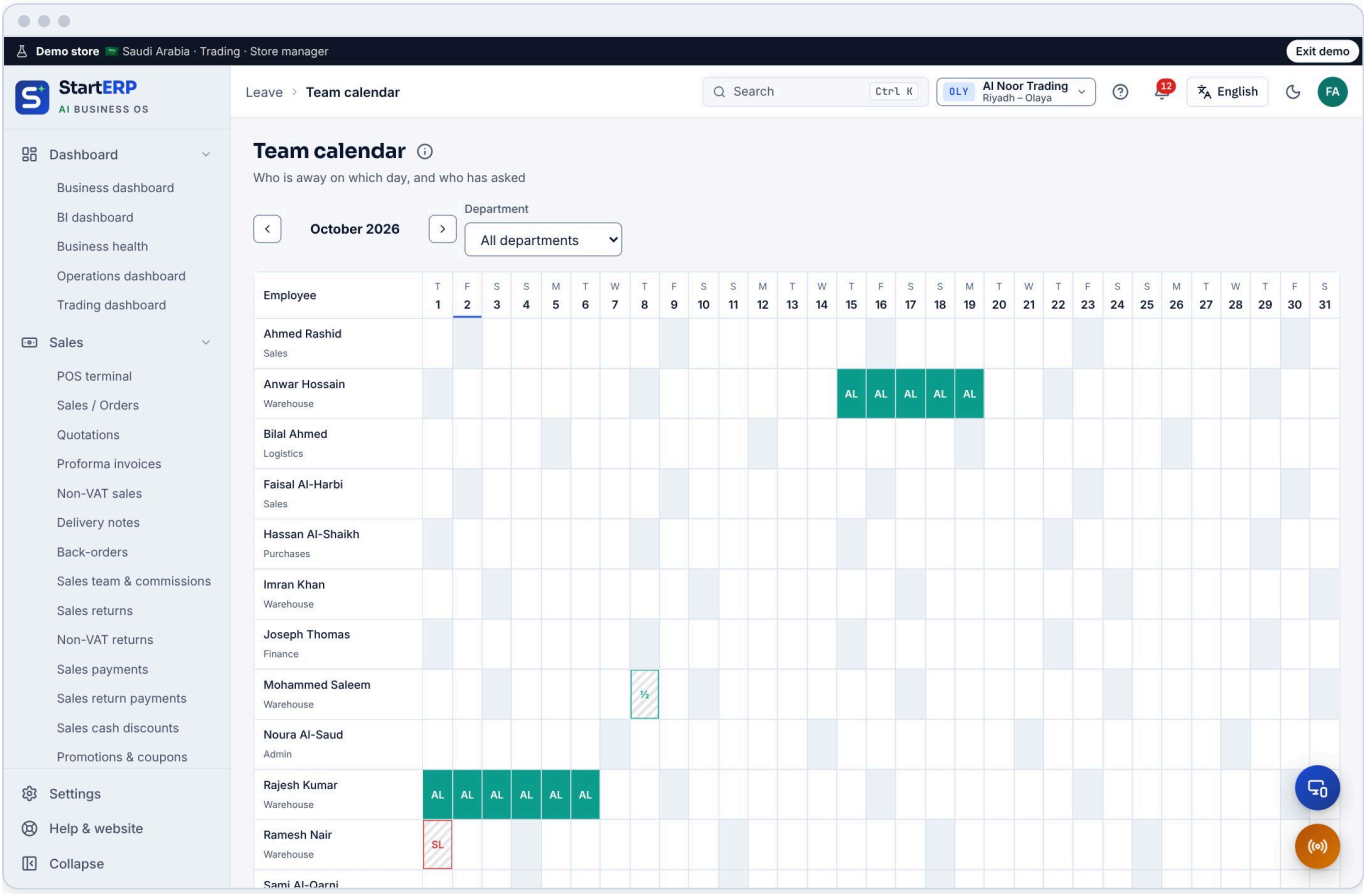
My leave

1. Open Leave → My leave. Each card shows a type's days left today, what you have earned so far, carried from last year, been given by HR, taken and are waiting for.
2. Press Ask for leave. Choose the type, the first and last day, and Morning only or Afternoon only for half a day.
3. The line under the days shows the days counted (weekends, public holidays and your rest days are not) and the balance left. Add a note if your manager needs one, then Send request.
4. The decision shows on My requests and on the bell. You can cancel a request while it waits, or approved leave that has not started yet.

Tips. Your user is not on the staff list yet? HR links it to your employee record on Leave set-up → People. Sick leave asks what the medical certificate says: keep the certificate, HR may ask for it.

Team calendar

A month of the staff's leave: who is away on which day, who has asked and waits for a decision, and everyone's days off and the public holidays, so you see the gaps before you approve. Part of the Leave requests & balances add-on.



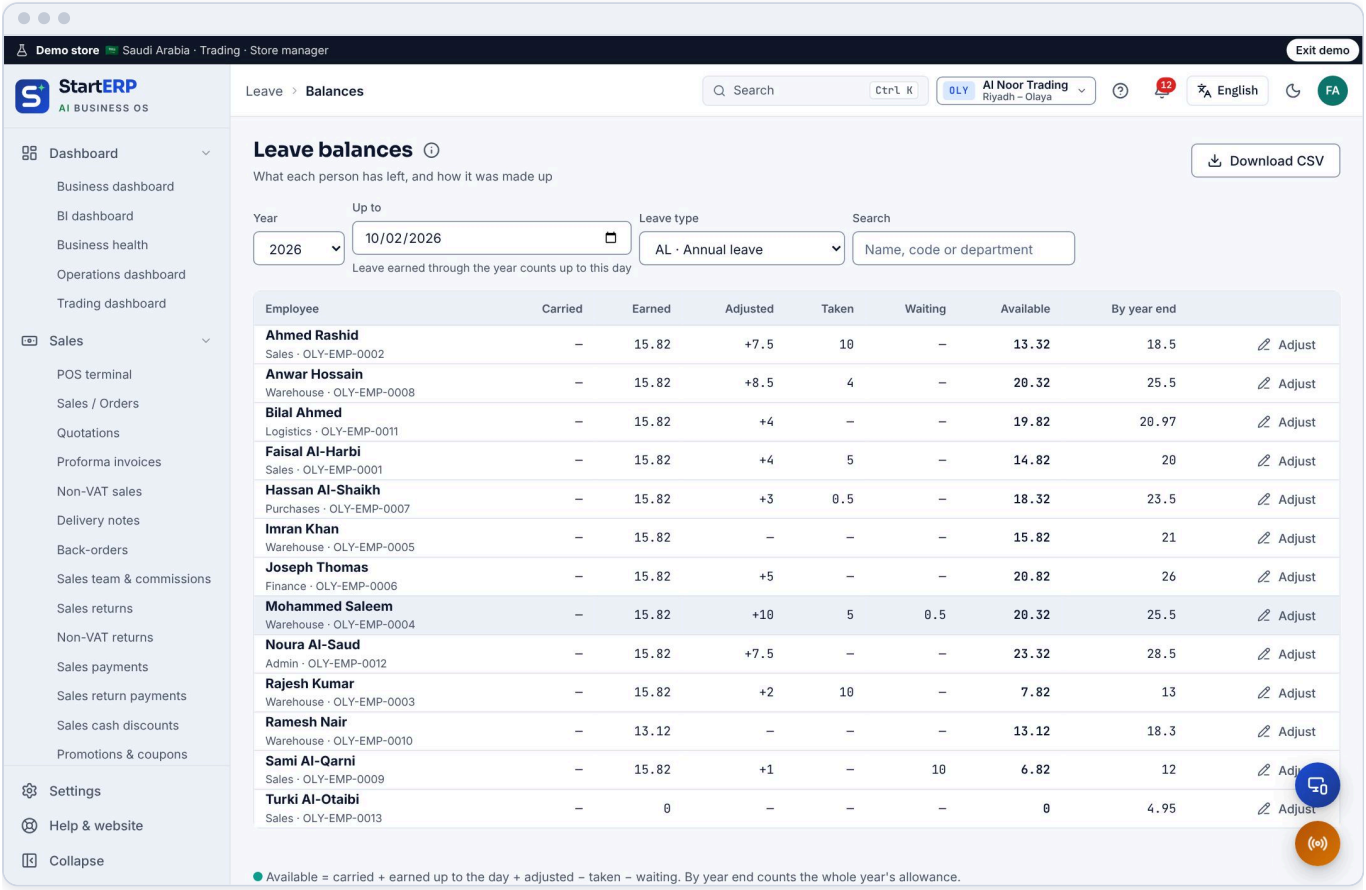
Team calendar

1. Open Leave → Team calendar. It opens on this month; the arrows go to the previous or next month.
2. Each coloured cell is a day of leave with its type's code; a striped cell is a request still waiting, a half-filled one half a day. Grey days are days off or public holidays.
3. The row under the days counts who is away on each day. Pick a department to see one team.
4. Press a cell to open its request and decide it.

Tips. With Attendance & shifts, each person's rest days come from their roster, and approved full days of leave show as leave on the attendance sheet.

Leave balances

Every employee's balance of one leave type in a year, and how it was made up: carried from last year, earned so far, adjusted, taken and waiting; what is available now and by the year's end. Add opening balances and corrections with their reason, and download the table as CSV. Part of the Leave requests & balances add-on.



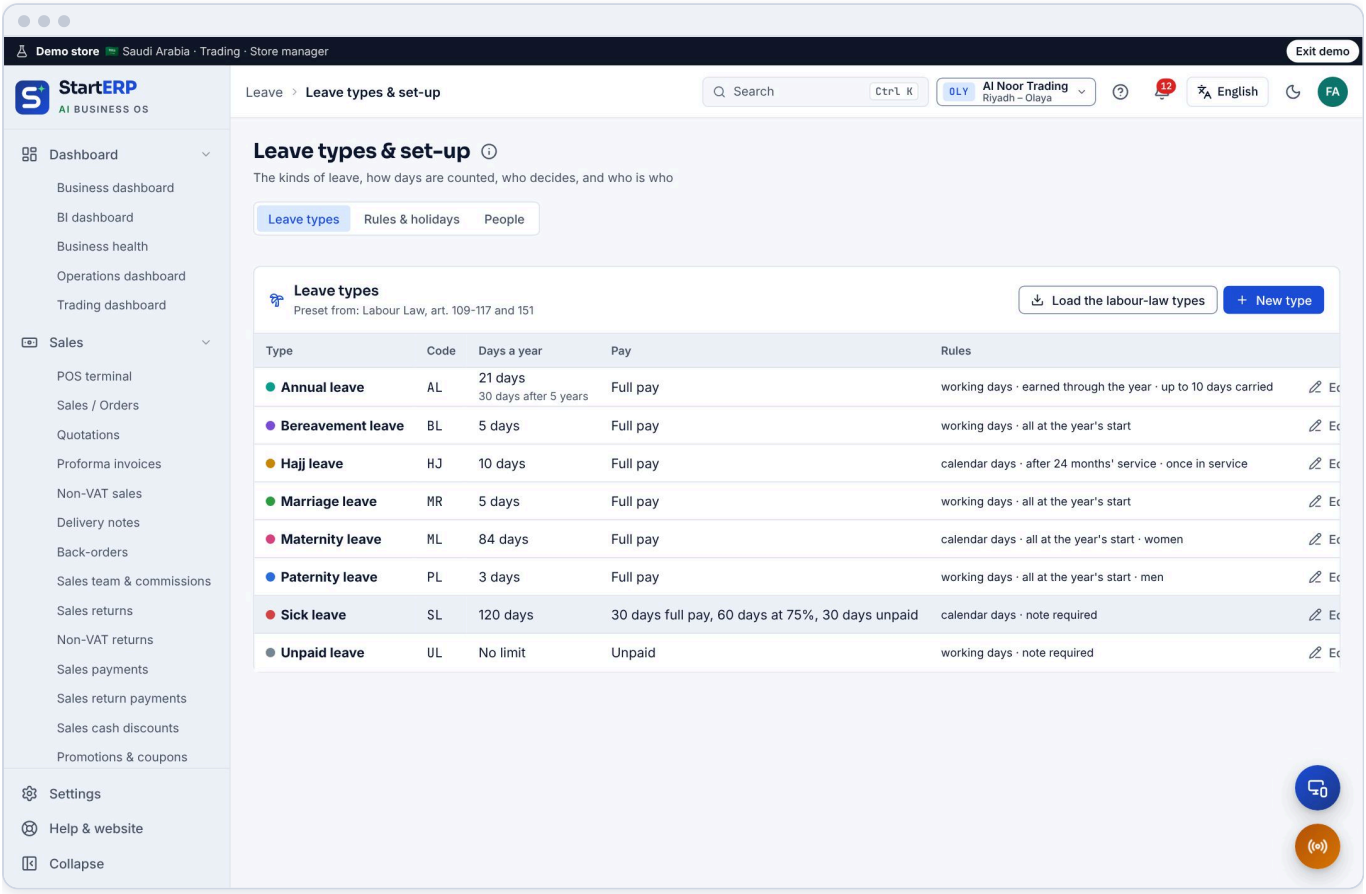
Leave balances

1. Open Leave → Balances. Pick the year and the leave type; Up to counts the leave earned through the year up to that day.
2. Available is carried + earned + adjusted − taken − waiting. A red number means more was taken than earned so far.
3. Press Adjust on a row to add days (an opening balance from the old spreadsheet, a reward) or take days off, with the reason. It is kept with your name.
4. Press Download CSV for the table of the type shown.

Tips. Unused days carry over to the next year up to the type's limit. Nothing is carried into the first year set on Leave set-up → Rules: give opening balances instead. Someone who joined this year earns from their joining day; someone who left, up to their last day.

Leave types & set-up

The kinds of leave your staff can take (days a year, how they are earned, carried and paid, who can take them), the weekend and the public holidays, who decides a request, and which user is which employee. Part of the Leave requests & balances add-on.



Leave types & set-up

1. Open Leave → Leave types & set-up. On Leave types, press Load the labour-law types to add your country's annual, sick, maternity, paternity and other leave, then change what your policy gives more.
2. Press New type or Edit: the days a year (and after 5 years), earned day by day or all at the year's start, months of service first, working or calendar days, days carried, the pay, or pay in tiers for sick leave.
3. On Rules & holidays, set the weekend, who decides a request (the employee's manager or HR, or HR only), the first year kept here, and the public holidays; Add the national days fills your country's fixed ones.
4. On People, link each employee to their user so they can ask on My leave. The manager is the one set on the employee's profile.

Tips. Eid and the other Islamic holidays move every year: add them when they are announced. To stop new requests of a type, turn it off instead of deleting it: requests already made keep its name. Maternity and paternity leave go by the gender on the employee's profile.

05

Payroll run & payslips

Add-on module

Payroll worked out, checked and paid in one place

Pick the month and the run is worked out for every employee: the pay on their record, part months for joiners and leavers, absences and overtime from Attendance & shifts, unpaid and partly paid sick leave from Leave requests, and the share of any advance to take back. Your country's social insurance and pension are taken at the law's rates for the month (GOSI, GPSSA, SPF, GRSIA, SIO, PIFSS, EPF and ESI), with your own rates where your agreement differs, and the end-of-service provision is set aside each month. Lines with a missing IBAN or ID, or pay that moved since last month, are flagged before you approve. Add a bonus or a fine to one line, leave someone out, then approve it yourself or send it to your approval policy. Posting records the salaries, contributions and provision in the ledger; you download the WPS, Mudad, ECR or bank file, record the payments in one step, and every employee opens their payslip on their phone.

What you get

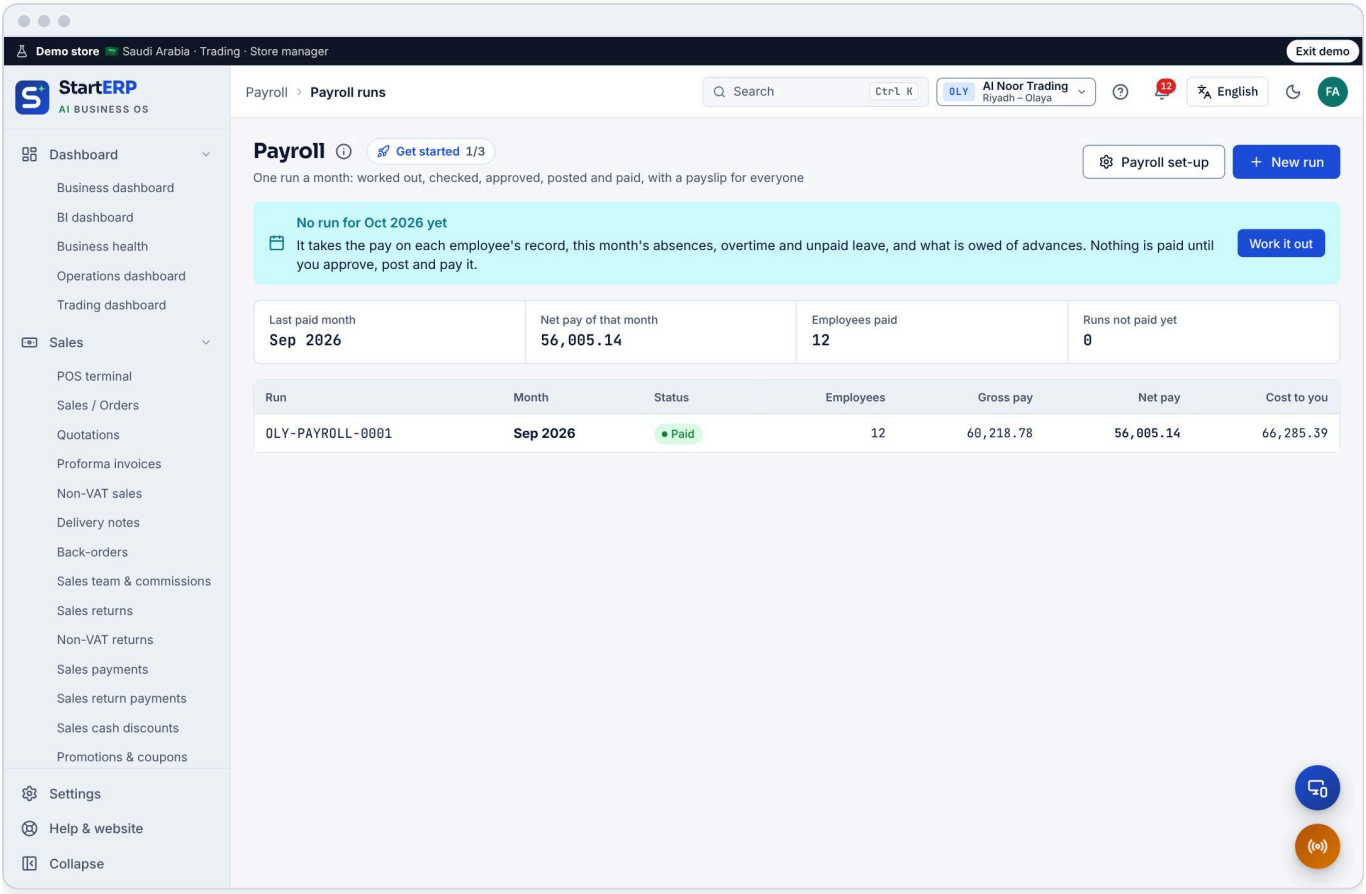
- Pay, part months, absences, overtime, unpaid leave and advances in one run
- Social insurance, pension and end of service by your country's rules
- Approve, post to the ledger, download the WPS or bank file and pay
- Payslips to print and for staff to open on their phone

GET STARTED IN 3 STEPS

1. **Check payroll settings.** Social insurance, pension and bank file.
2. **Run the month.** Review flagged lines, then approve.
3. **Pay and share payslips.** Download the bank file; staff see payslips on their phone.

Payroll runs

One payroll run a month for the whole staff: each month's state (worked out, waiting for approval, approved, posted, paid), its net pay and what it cost you. Start the month here; nothing is paid until you approve, post and pay it. Part of the Payroll run & payslips add-on.



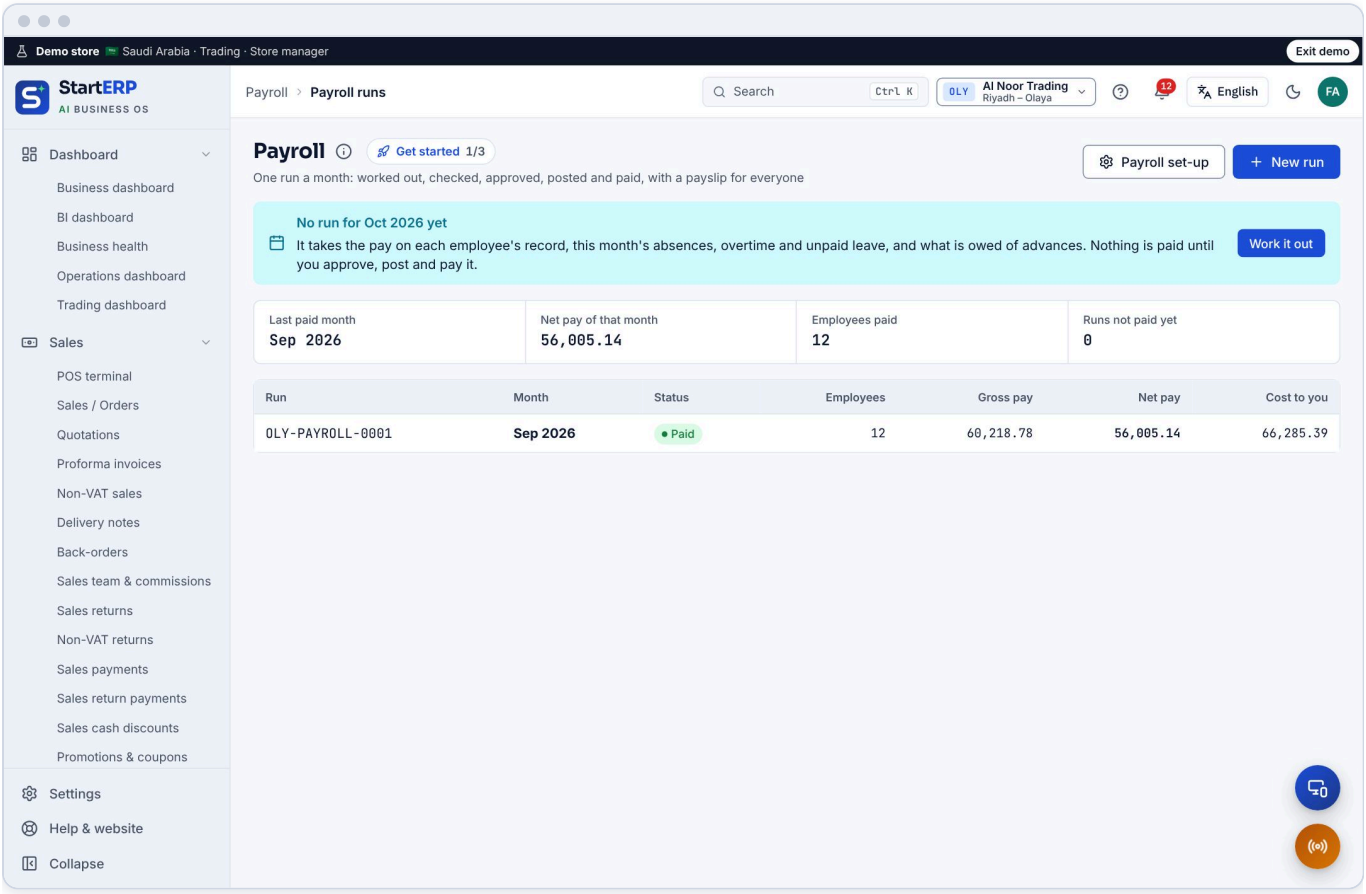
Payroll runs

1. Open Payroll → Payroll runs. The cards show the last paid month, its net pay, how many were paid and the runs not paid yet.
2. Press New run (or Work it out on the blue note), check the month and press Work it out.
3. The run takes the pay on each employee's record, the month's absences and overtime from Attendance & shifts, unpaid leave from Leave requests and the advances owed, with your country's social insurance and end of service.
4. Press a month in the list to open its run.

Tips. One run a month: to start a month again, delete its draft first. Cost to you is the gross pay plus your share of social insurance and the end-of-service provision.

Check, approve, post and pay

A month's run line by line: what each employee earned, what was taken and why, and what you pay on top. Change a line, approve the run (or send it to your approval policy), post it to the ledger, download the bank or WPS file and record the payments. Part of the Payroll run & payslips add-on.



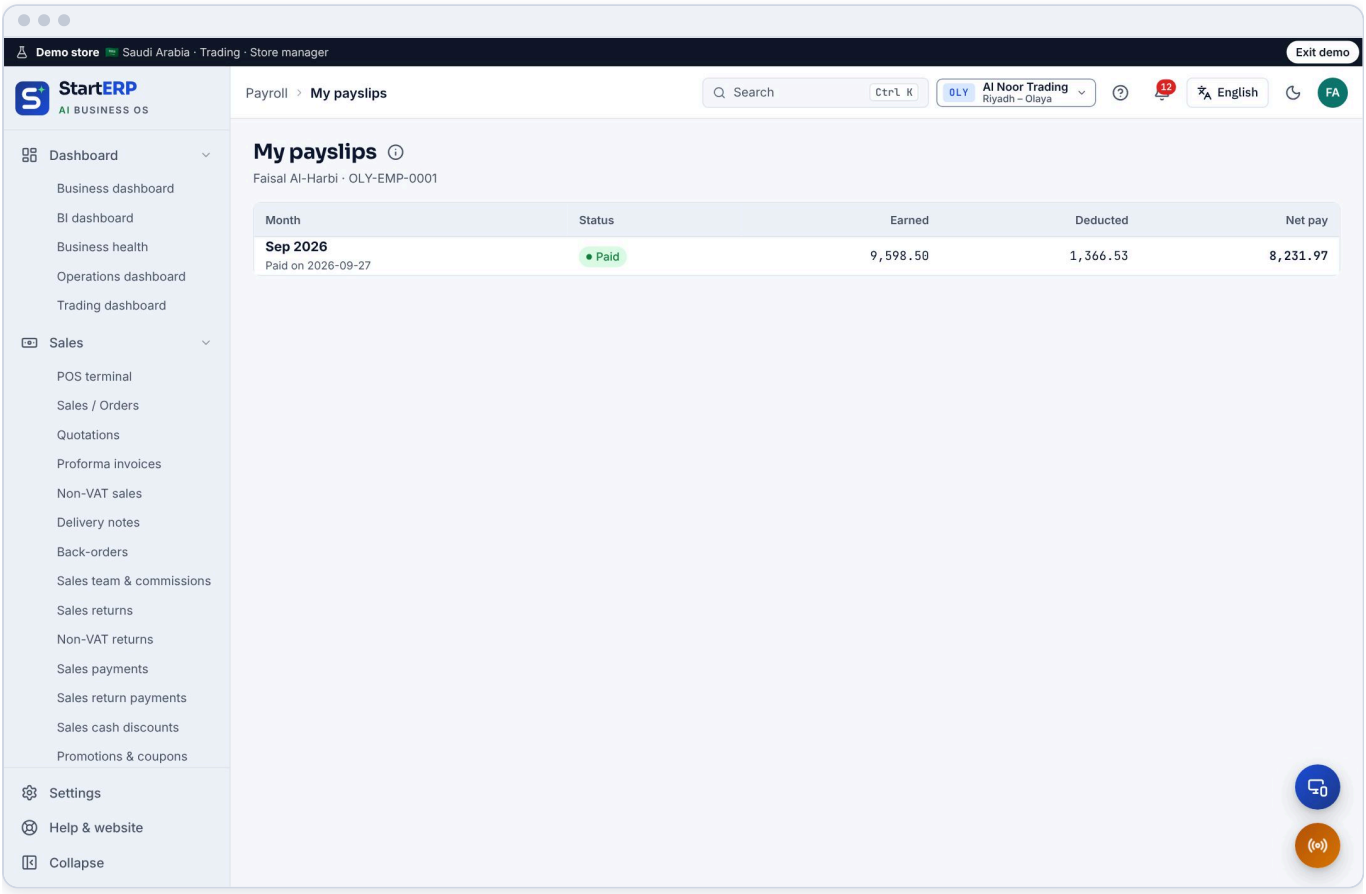
Check, approve, post and pay

1. Open a run from Payroll runs. The four steps at the top show where it is; the cards show the gross pay, deductions, net pay and your share.
2. Check the lines: the Check column flags a missing IBAN or ID, a first month, or pay that moved 10% or more since last month. Press a line to see it in full.
3. On a draft line add a one-off bonus or deduction, change the advance taken back, write a note for the payslip or leave the person out, then Save line.
4. Press Approve. With Workflows & approvals and a policy for payroll, the run waits for it in My tasks; Withdraw takes it back.
5. Press Post to the ledger: salaries, contributions and the end-of-service provision go in as salaries payable.
6. Download the WPS, Mudad, ECR or bank file for your bank, then Pay salaries with the day paid: one salary payment per employee, and the payslips are ready.

Tips. Work out again brings in today's records (a late absence, a pay rise) and keeps your changes to the lines. A file lists what it is missing, such as an employee's IBAN or your establishment number; fill it on the employee or in Payroll set-up. A posted run cannot be changed: correct a mistake in next month's run with a one-off item.

My payslips

Your payslip for every month that has been posted: what you earned, what was taken and why, and your net pay, to read on your phone or print. Part of the Payroll run & payslips add-on.



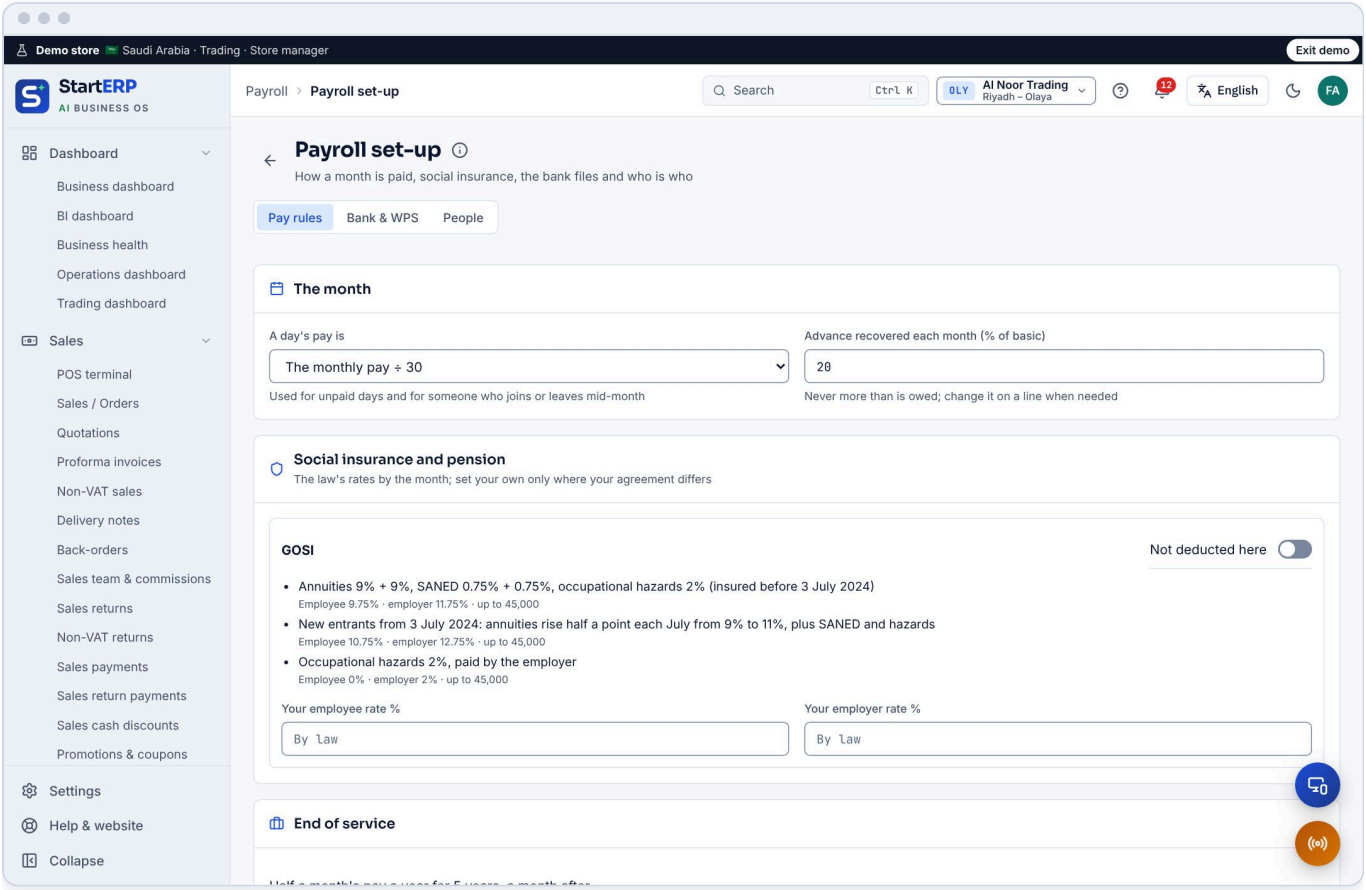
My payslips

1. Open Payroll → My payslips. Each month shows what you earned, what was deducted and your net pay.
2. Press a month to open its payslip: the days paid, each earning and deduction, and what your employer pays on top.
3. Press Print for a paper copy or a PDF.

Tips. Your user is not on the staff list yet? HR links it on Payroll set-up → People.

Payroll set-up

How a month is paid: a day's pay, the share of basic taken back for advances, your country's social insurance with your own rates where your agreement differs, the end-of-service rule, your details on the bank and WPS files, and each person's user, insurance date and income tax. Part of the Payroll run & payslips add-on.



Payroll set-up

1. Open Payroll → Payroll set-up. On Pay rules choose how a day's pay is worked out and the share of basic taken back each month for advances.
2. Each social insurance scheme shows the law's rates for this month; fill your own rates only where your agreement differs, or mark it Not deducted here.
3. Save pay rules, then pick an employee under Check one person's pay to see this month's pay by the rules.
4. On Bank & WPS fill your details the files need, such as the establishment number and your bank's routing code.
5. On People press Edit on a person to link their user for My payslips, set when they were first insured, a monthly income tax, or no social insurance.

Tips. The pay itself (basic, housing, transport, other allowances), the IBAN and the IDs are on each employee's record. Changes apply to runs you work out from now; press Work out again on a draft to bring them in. Malta: social security (Class 1) is 10% + 10% of the basic weekly wage for each Monday in the month, between the Category B minimum and the 2026 maximum, plus the employer's 0.3% Maternity Leave Trust Fund. On People set each person's FSS tax status from their FS4 (single, married or parent, with 1 or 2+ children) and tick 'born before 1962' where it applies; the FSS tax is then worked out from the 2026 tables. Put your PE number on Bank file to get the FS5 summary of each run. Ask your accountant to check the rates each January, and to file the FS5 by the end of the next month and the FS3 / FS7 after the year.

06

Onboarding & exit checklists

Add-on module

Every joiner set up and every leaver signed off, nothing missed

Open a checklist when someone joins or leaves and every task is laid out with who does it and by when: HR registers the contract and the social insurance, IT hands over the laptop and the access, the manager runs the induction and the probation review, and the employee gives their bank account from their own phone. For a leaver the list runs the other way: the letter, the handover, the assets back, access closed, the permits cancelled and the final settlement paid, estimated for you from the end-of-service rules of your country, the annual leave left and the advances still owed. Overdue tasks stand out, each person sees only their own tasks in My HR tasks, and closing a leaver's checklist marks them as left on their last day so payroll and attendance follow.

What you get

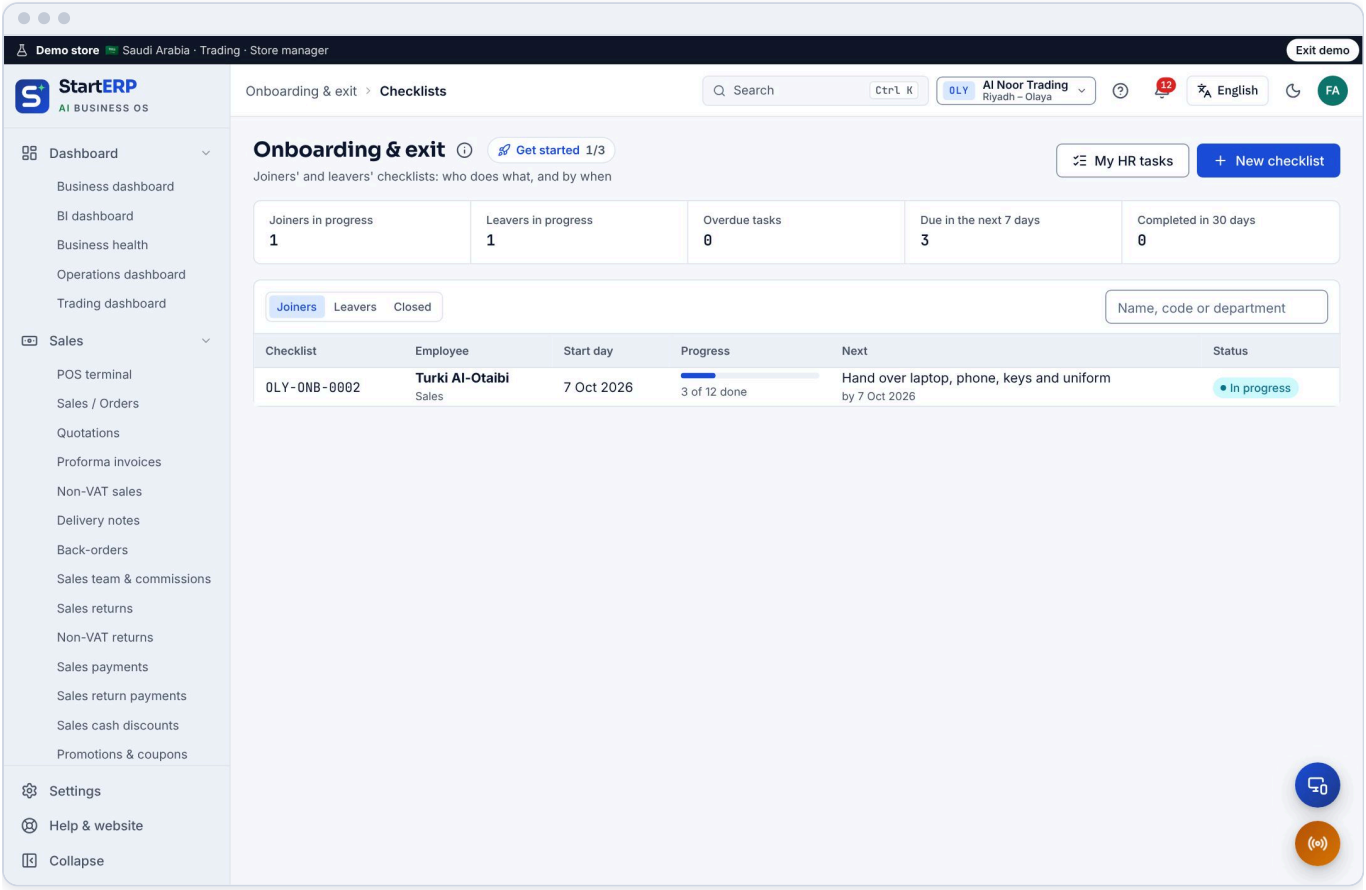
- Your country's joining and leaving steps, ready to use and yours to change
- Each task to HR, the manager, IT, finance or the employee, with a due day
- Everyone ticks their own tasks on their phone; overdue ones stand out
- The final settlement estimated from end of service, leave left and advances

GET STARTED IN 3 STEPS

1. **Review the checklist templates.** Joiner and leaver tasks, ready-made.
2. **Open a checklist.** For someone joining or leaving.
3. **Work your tasks.** Each person sees only theirs.

Joiner checklists

A checklist for every new joiner: the contract, your country's registrations, the bank account, medical insurance, equipment and access, the induction and the probation review, each task given to HR, the manager, IT, finance or the employee with a due day counted from the start day. Part of the Onboarding & exit checklists add-on.



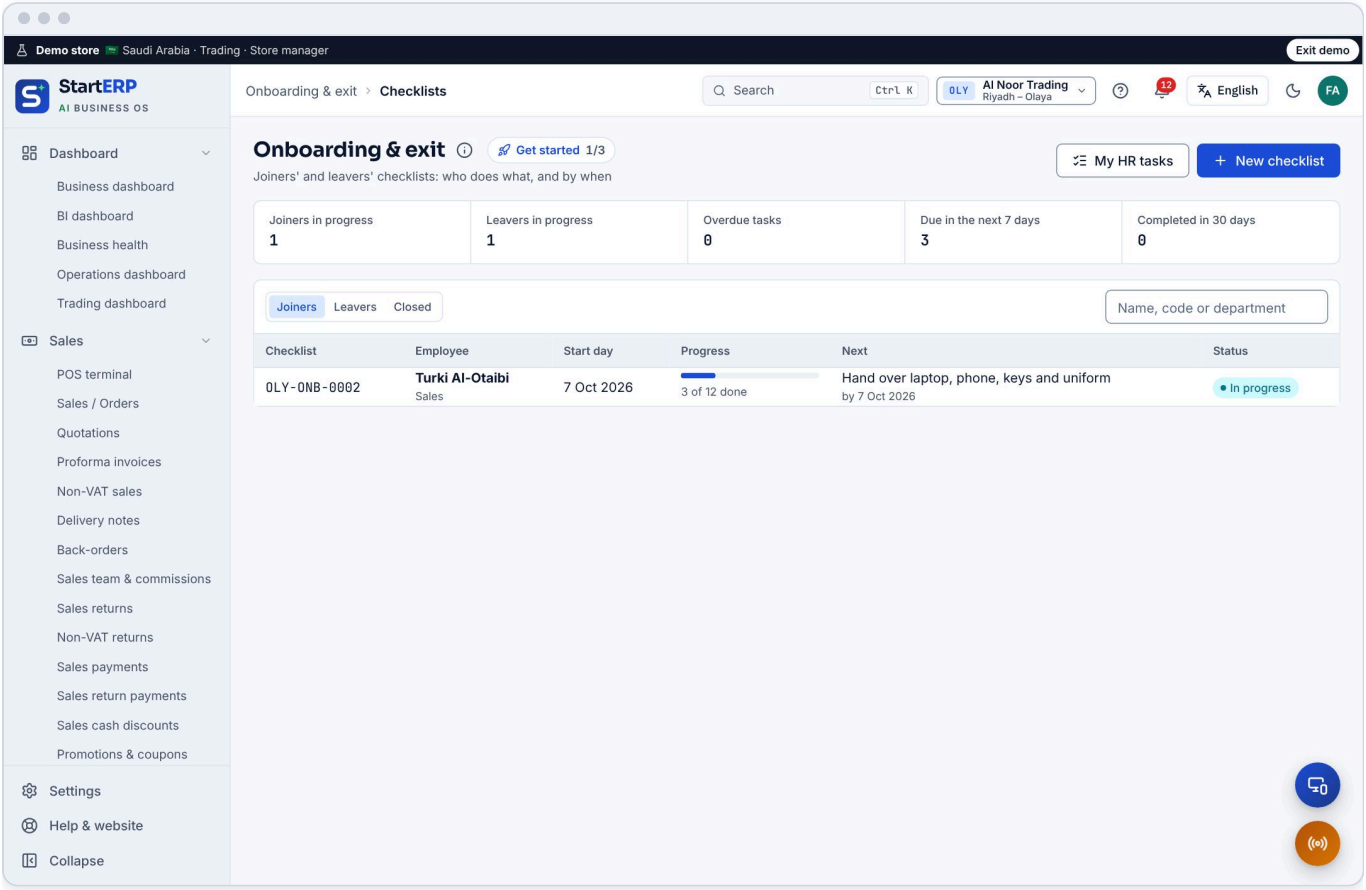
Joiner checklists

1. Open Onboarding & exit → Checklists. Joiners shows every joiner's checklist in progress, how far it is and the next task.
2. Press New checklist (or Open joiner checklist next to someone who joined lately), choose Joining, the employee, the list and the start day, then press Open checklist.
3. Press a checklist to open it. Press Done on each task as it is finished, or Skip with the reason when it does not apply; required tasks are always done.
4. When every task is done or skipped, press Close checklist. It moves to Closed.

Tips. Overdue tasks stand out in amber, and the counts at the top show what is overdue and what falls due this week. The manager's and the employee's tasks go to their own users once they are linked on Checklist set-up → People.

Leaver checklists and settlement

A checklist for everyone leaving: the letter, the handover, the assets back, access closed, the permits cancelled and the final settlement, estimated from your country's end-of-service rules, the annual leave left and the advances still owed. Closing it marks the employee as left on the last day. Part of the Onboarding & exit checklists add-on.



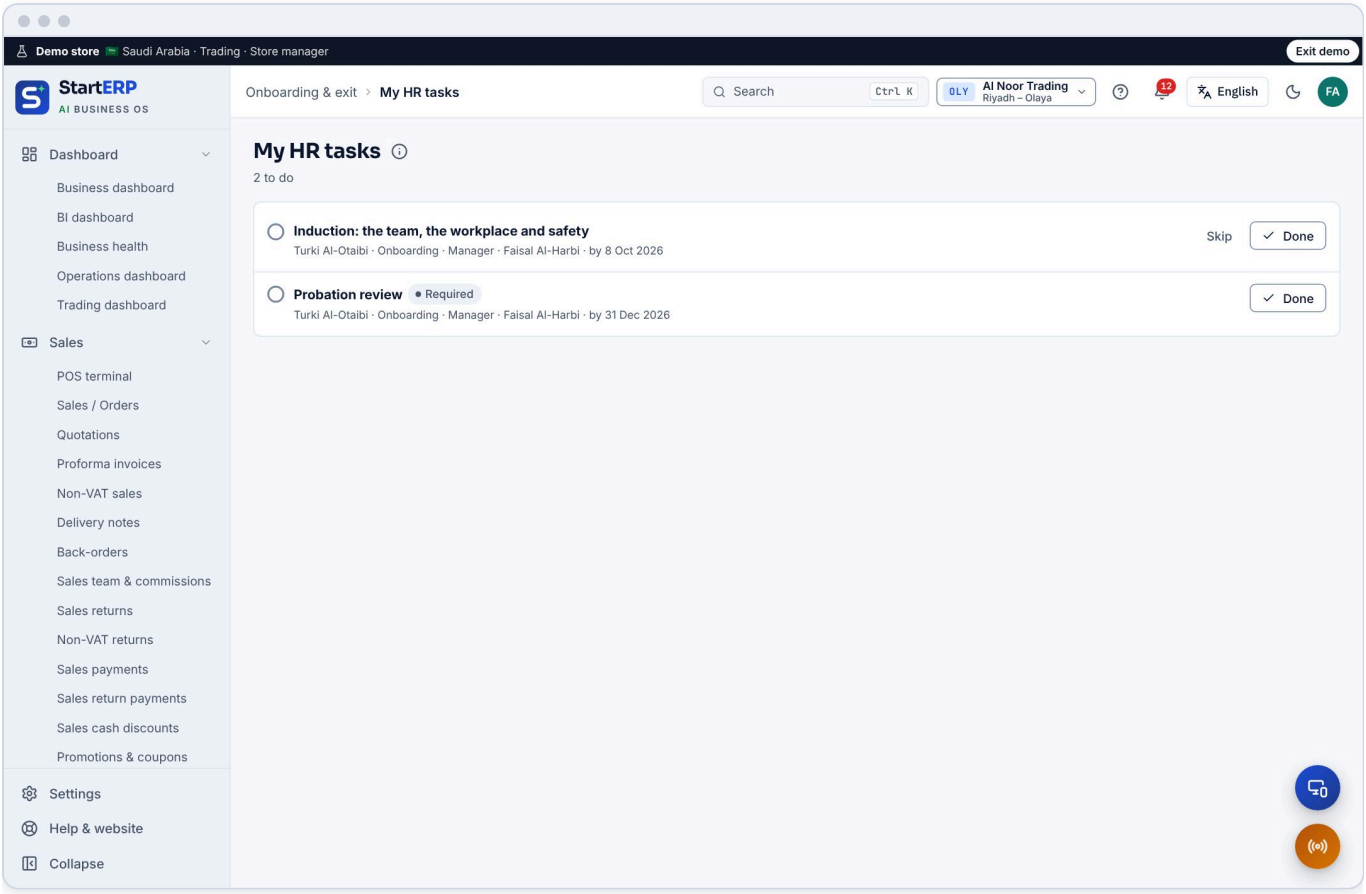
Leaver checklists and settlement

1. Press New checklist and choose Leaving, or Open exit checklist next to someone on notice.
2. Choose the employee, the last working day and the reason for leaving. The final settlement estimate shows below: end of service, leave left and advances.
3. Press Open checklist. The employee is on notice until the last day; tick each task as it is done on the Leavers tab.
4. On or after the last day, with every task done or skipped, press Close and mark as left. The settlement is kept on the checklist.

Tips. A resignation earns part of the end-of-service award where the law says so (in Saudi Arabia a third after 2 years and two thirds after 5); a dismissal or the end of a contract earns all of it. The last month's salary is paid through the payroll run, which counts the days up to the last day. Cancel the checklist if the resignation is withdrawn: the employee's status comes back.

My HR tasks

The joining and leaving tasks given to you, soonest first: as HR, IT or finance, as the manager of a new joiner, or your own as a joiner giving your bank account. Part of the Onboarding & exit checklists add-on.



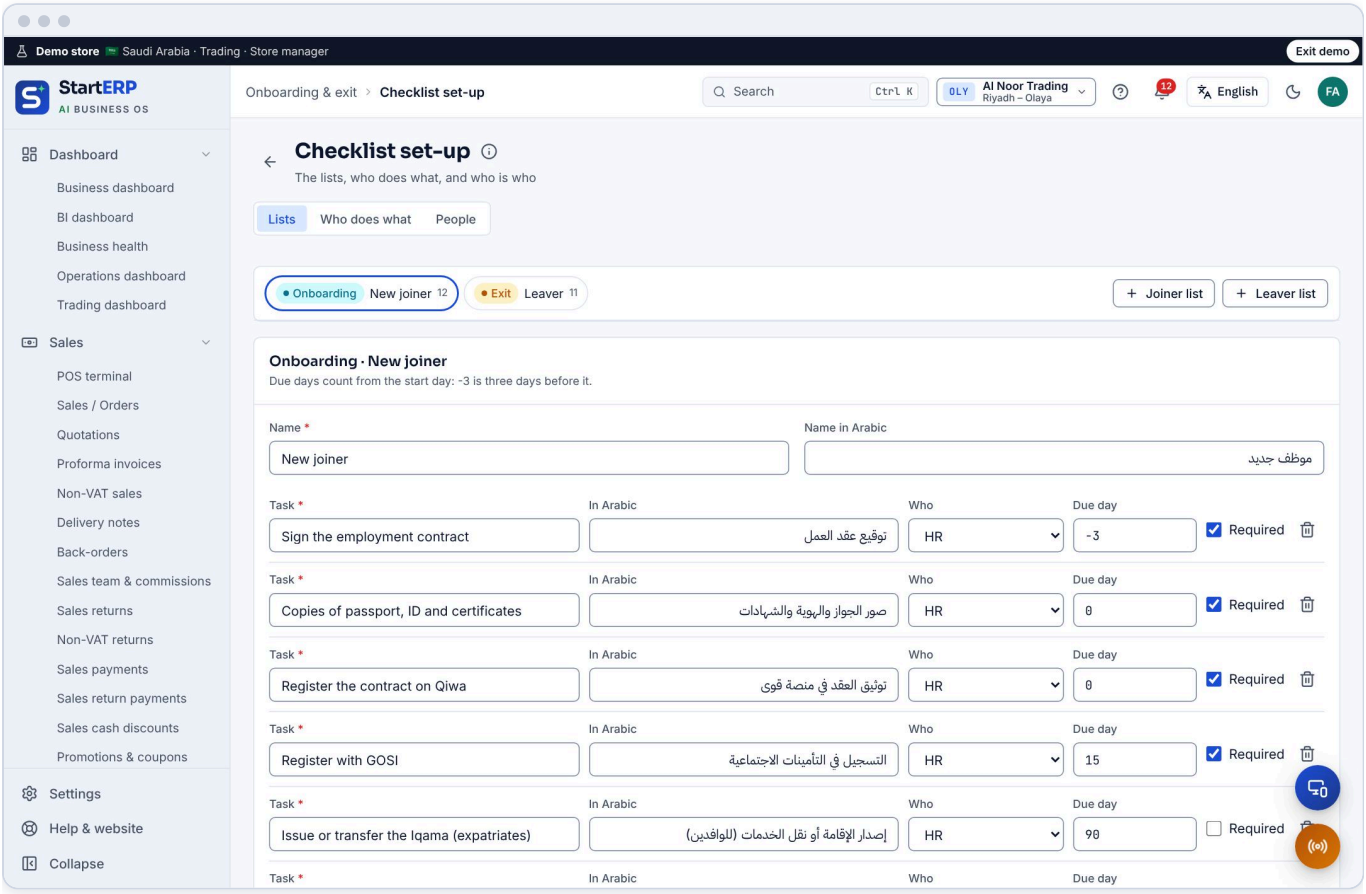
My HR tasks

1. Open Onboarding & exit → My HR tasks. Each task shows who it is for, by when, and whether it is overdue.
2. Press Done when you have finished a task, or Skip with the reason when it does not apply to this person.
3. What you did lately shows below; press Undo if you ticked one by mistake.

> **Tips.** Your user must be linked to your employee record to get the tasks you do as a manager or as the employee; HR links it on Checklist set-up → People.

Checklist set-up

The lists checklists are made from, starting with your country's steps: each task with its owner, its due day and whether it is required; who does the HR, IT and finance tasks; and each person's user. Part of the Onboarding & exit checklists add-on.



Checklist set-up

1. Open Onboarding & exit → Checklist set-up. On Lists pick a list to change its tasks: the task, who does it, the due day (days from the start or the last day; negative is before) and Required.
2. Press Add task for one more, Joiner list or Leaver list for another list (for example, for drivers), then press Save lists.
3. On Who does what choose the users who get the HR, IT and finance tasks of new checklists.
4. On People choose each employee's user, so managers and employees get their own tasks.

Tips. Changes apply to checklists you open from now; open ones keep their tasks.

Set-up, help and training

The StartERP team sets up your store, imports your products, customers and opening balances from Excel or CSV, and trains your users on the screens they use.

> **Need an add-on module?** Ask your StartERP contact to switch it on for your store, or write to **sirin@starterp.org** or WhatsApp **+966 50 197 1075**.

The full set of module guides

#	Guide
1	The basics every store has
2	Selling and documents
3	Customers, CRM and loyalty
4	Restaurants and cafés
5	Purchasing and inventory
6	Finance and accounting
7	**HR and payroll (this guide)**
8	AI, automation and reports
9	Online, integrations and control
10	Industry modules
11	Hospitals, clinics, pharmacies and opticians
12	Law firms
13	Hotels and resorts
14	Real estate agencies

All guides can be downloaded in StartERP under Help → User guides.



StartERP

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