

SF HRMS

Complete people management for Indian businesses: HR, attendance, leave, payroll, compliance, hiring and performance in one connected system.

Employee 360°

Geo-fenced Attendance

Leave

Payroll

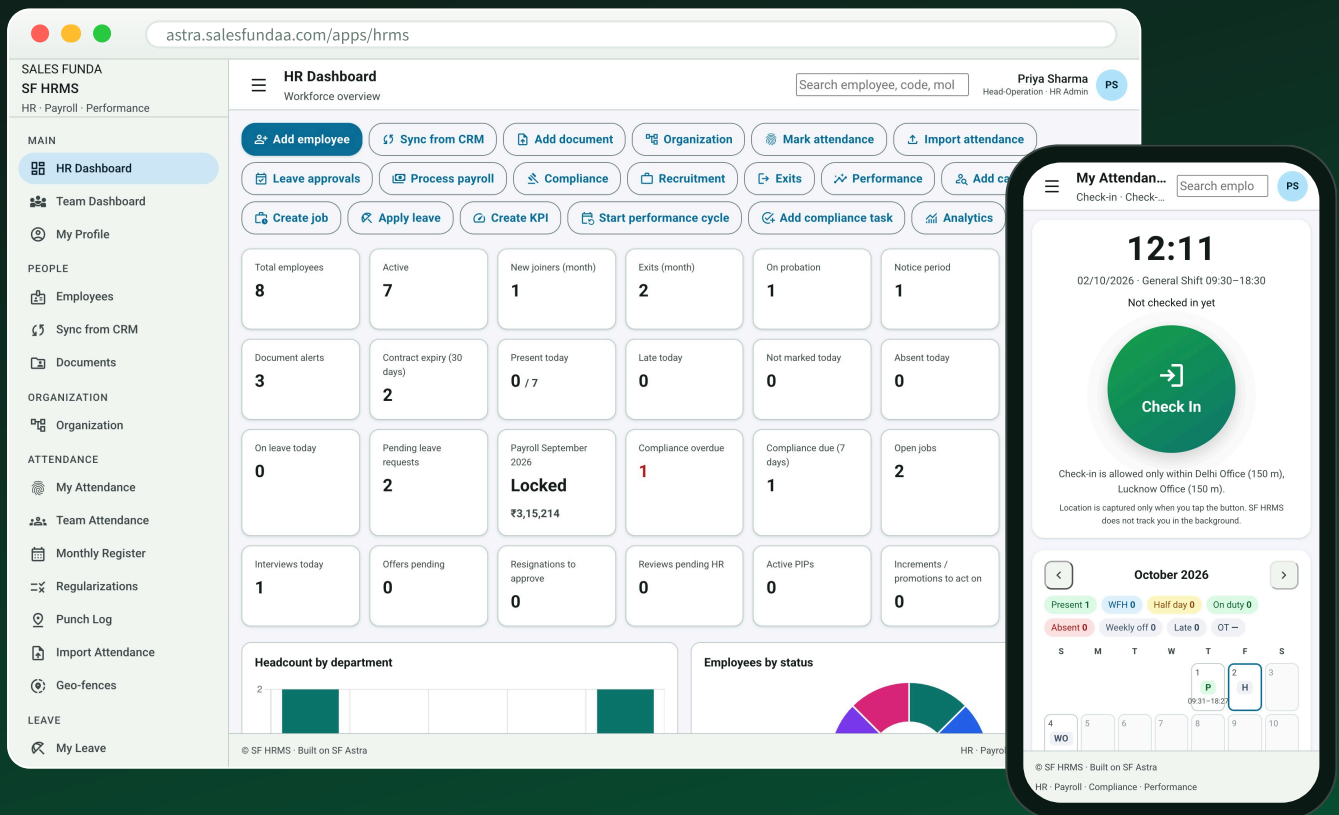
PF · ESI · PT · TDS

Recruitment

Letters & Exit

Performance

Analytics & Reports



The image displays the SF HRMS interface, showing a web dashboard and a mobile app interface.

Web Dashboard (SF HRMS):

- Header:** SALES FUNDA SF HRMS, HR · Payroll · Performance, Search employee, code, mol, Priya Sharma (Head Operation · HR Admin).
- Left Sidebar:** MAIN (HR Dashboard, Team Dashboard, My Profile), PEOPLE (Employees, Sync from CRM, Documents), ORGANIZATION (Organization), ATTENDANCE (My Attendance, Team Attendance, Monthly Register, Regularizations, Punch Log, Import Attendance), LEAVE (Geo-fences, My Leave).
- HR Dashboard (Workforce overview):**
 - Buttons:** Add employee, Sync from CRM, Add document, Organization, Mark attendance, Import attendance, Leave approvals, Process payroll, Compliance, Recruitment, Exits, Performance, Add compliance task, Analytics.
 - Metrics:**
 - Total employees: 8
 - Active: 7
 - New joiners (month): 1
 - Exits (month): 2
 - On probation: 1
 - Notice period: 1
 - Document alerts: 3
 - Contract expiry (30 days): 2
 - Present today: 0 / 7
 - Late today: 0
 - Not marked today: 0
 - Absent today: 0
 - On leave today: 0
 - Pending leave requests: 2
 - Payroll September 2026: Locked ₹3,15,214
 - Compliance overdue: 1
 - Compliance due (7 days): 1
 - Open jobs: 2
 - Interviews today: 1
 - Offers pending: 0
 - Resignations to approve: 0
 - Reviews pending HR: 0
 - Active PIPs: 0
 - Increments / promotions to act on: 0
 - Visuals:** Headcount by department (bar chart), Employees by status (donut chart).

Mobile App (My Attendance):

- Header:** My Attendance..., Check-in · Check-out, Search employee, PS.
- Time:** 12:11
- Date/Shift:** 02/10/2026 - General Shift 09:30-18:30
- Status:** Not checked in yet
- Check In Button:** Large green button with a checkmark icon.
- Location Info:** Check-in is allowed only within Delhi Office (150 m), Lucknow Office (150 m). Location is captured only when you tap the button. SF HRMS does not track you in the background.
- Calendar:** October 2026. Legend: Present 1, WFH 0, Half day 0, On duty 0, Absent 0, Weekly off 0, Late 0, OT --.

WHY SF HRMS

One HR system, from hiring to exit

SF HRMS gives HR, managers and employees one place to work. Users come straight from your Sales Funda® CRM, so there is no double entry. Every rule is configurable and every change is recorded.

10

integrated modules

47

ready reports with Excel /
PDF export

18

tabs in the Employee 360°
view

3

roles: HR Admin, Manager,
Employee

WHAT MAKES IT DIFFERENT



Connected to Sales Funda® CRM

CRM users become employees in one click, with reporting managers linked. One login for both.



Right data for the right person

HR sees everything, managers see their team, employees see only their own records, enforced on the server.



Sensitive data protected

Salary, bank, PAN and Aadhaar are masked for non-HR users. Documents never have public links.



Complete audit trail

Who changed what and when, with before and after values, including report exports.



Configurable, not hard-coded

Shifts, leave types, salary components, statutory rules, rating scales and letter templates are all settings.



Built for Indian payroll

PF, ESI, Professional Tax, TDS in the old and new regimes, annual tax statement, gratuity and F&F.



Works on any device

Employees check in, apply for leave and download payslips from their phone. HR works on desktop.



Decisions backed by data

Live dashboards, analytics and 47 reports across attendance, payroll, hiring and performance.

THE MODULES



Employees



Attendance



Leave



Payroll



Tax & Compliance



Recruitment



Letters & Exit



Performance



Analytics



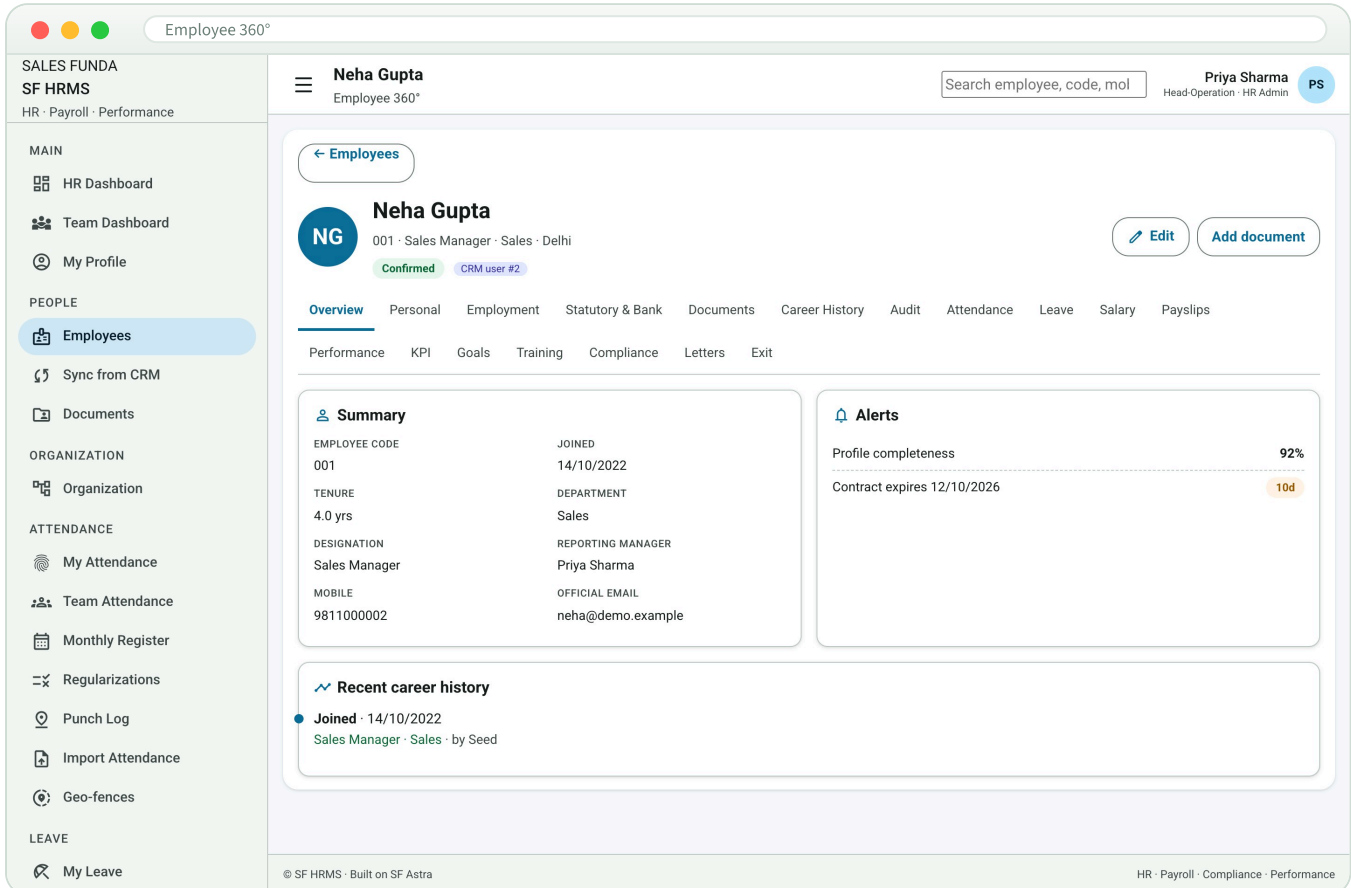
Reports



01 CORE HR

Employee Management

One complete record per employee, from joining to exit. HR sees everything in a single 360° view; employees keep their own profile up to date.



The screenshot displays the 'Employee 360°' interface for Neha Gupta. The left sidebar contains navigation menus for MAIN (HR Dashboard, Team Dashboard, My Profile), PEOPLE (Employees, Sync from CRM, Documents), ORGANIZATION (Organization), ATTENDANCE (My Attendance, Team Attendance, Monthly Register, Regularizations, Punch Log, Import Attendance, Geo-fences), and LEAVE (My Leave). The main content area shows the employee's profile with a search bar, a list of tabs (Overview, Personal, Employment, Statutory & Bank, Documents, Career History, Audit, Attendance, Leave, Salary, Payslips), and a sub-menu (Performance, KPI, Goals, Training, Compliance, Letters, Exit). The 'Overview' tab is active, showing a summary of employee details (Employee Code: 001, Tenure: 4.0 yrs, Designation: Sales Manager, Mobile: 9811000002, Joined: 14/10/2022, Department: Sales, Reporting Manager: Priya Sharma, Official Email: neha@demo.example). It also includes an 'Alerts' section showing 'Profile completeness' at 92% and 'Contract expires 12/10/2026' in 10 days. A 'Recent career history' section shows 'Joined - 14/10/2022' for 'Sales Manager - Sales - by Seed'. The bottom of the interface shows the user 'Priya Sharma' (Head-Operation - HR Admin) and the system version '© SF HRMS - Built on SF Astra'.

Employee 360° shows profile completeness, contract alerts and career history at a glance.



Employee master

Personal, employment, statutory (PAN, UAN, ESIC, Aadhaar) and bank details. Sensitive values are masked.



18-tab Employee 360°

Overview, personal, employment, statutory & bank, documents, history, audit, attendance, leave, salary, payslips, performance, KPI, goals, training, compliance, letters and exit.



Secure documents

Upload by category with expiry dates. Alerts for expiring contracts and IDs; no public URLs.



People alerts

Birthdays, work anniversaries, probation due dates and incomplete profiles on the HR dashboard.



Sync from Sales Funda® CRM

Onboard CRM users as employees with their reporting manager. No re-typing.



Organisation setup

Departments, designations, branches, grades and work locations, with an org chart by reporting line.



Lifecycle & history

Onboarding → Probation → Confirmed → Notice → Exited, with promotions, transfers and salary changes recorded.



Instant search

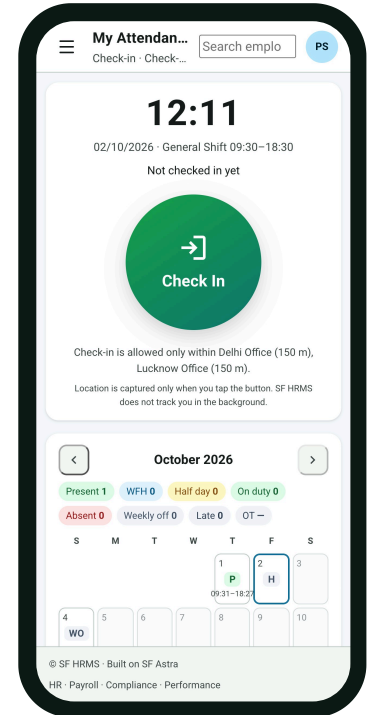
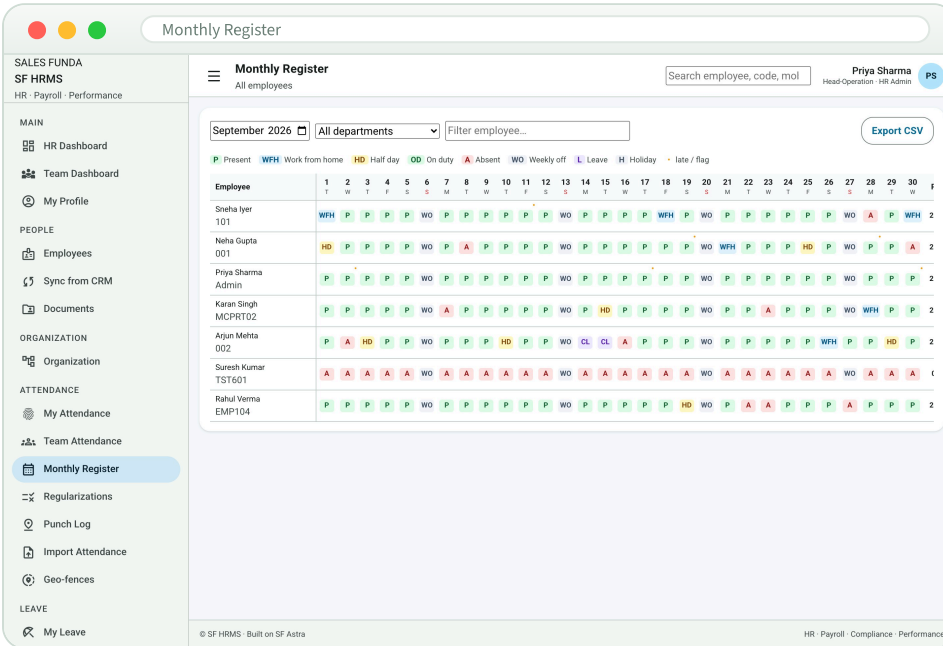
Find any employee by name, employee code or mobile from every screen.



02 TIME & ATTENDANCE

Attendance

Employees check in from their phone inside your office geo-fence. Late marks, half days and overtime are calculated automatically and flow straight into payroll.



Geo-fenced mobile check-in

Check-in allowed only within office radius. Location is captured at the tap, never tracked in the background.



Shifts & weekly offs

Shift timings, grace minutes, half-day rules and weekly offs per employee or branch.



Monthly register

Day-wise colour-coded grid for every employee, filters by department and CSV export.



Import attendance

Bring data from biometric devices or other systems through Excel / CSV import.



Work from home & on duty

WFH and field duty marked separately, with outside-location flags for review.



Late, early & overtime

Calculated automatically from punches and shown on the register and reports.



Regularization workflow

Missed punch or correction requests → manager → HR approval, fully audited.



Month lock

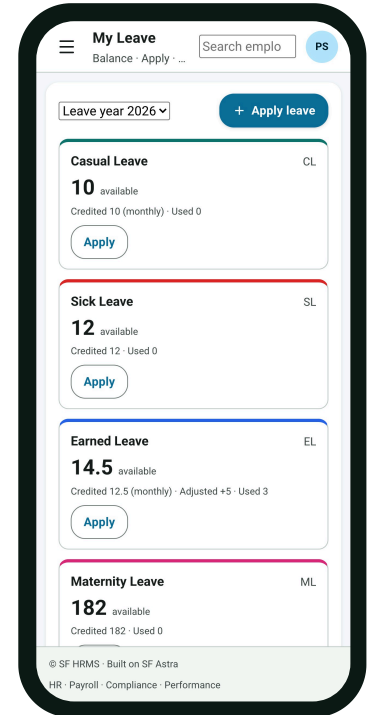
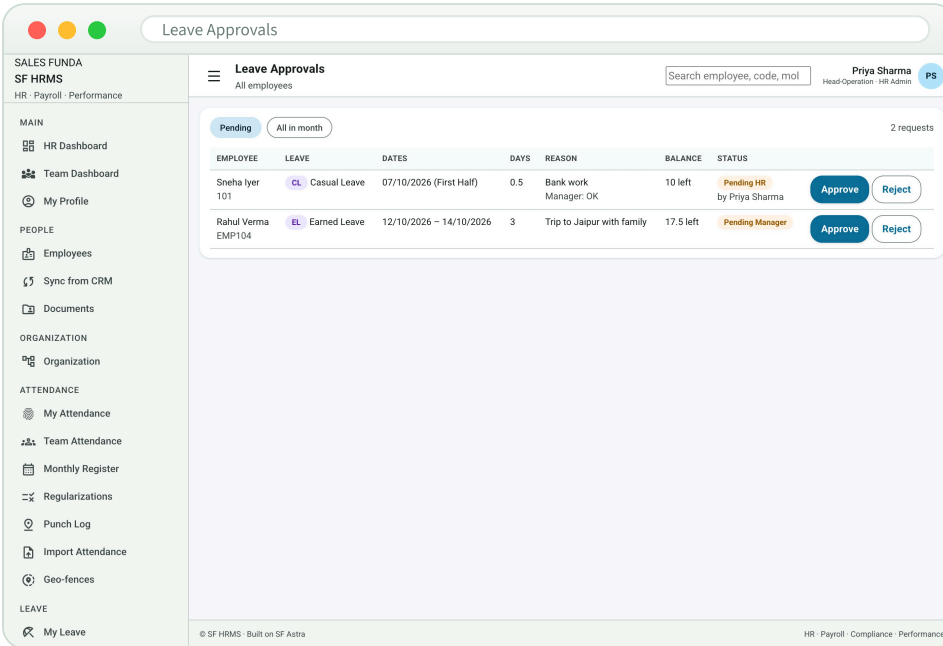
Lock attendance before payroll so numbers cannot change after salaries are processed.



03 TIME OFF

Leave & Holidays

Your leave policy, exactly as you run it. Employees see live balances and apply in seconds; approvals move from manager to HR and update attendance and payroll automatically.



Configurable leave types

CL, SL, EL, maternity, comp off and more: entitlement, monthly or yearly accrual, carry forward, encashment and applicability by gender or status.



Apply in seconds

Full day or half day, balance checked instantly. HR can apply on behalf of an employee.



Leave calendar

See who is away across the team and company before approving.



Live balances

Credited, used, pending and available for each type, with opening balances and HR adjustments.



Approval flow

Manager → HR, or HR only, as configured. Comments and decisions are recorded.



Holiday calendar

Holidays by branch, including optional holidays employees can choose.

CONNECTED AUTOMATICALLY

Approved leave appears on the attendance register and is used for **payable days and LOP** in payroll. No manual reconciliation.



04 PAYROLL

Payroll

Accurate monthly payroll in a few steps: attendance and leave come in automatically, statutory deductions are calculated, and employees get professional payslips on their phone.

SALES FUNDA
SF HRMS
HR · Payroll · Performance

MAIN

- HR Dashboard
- Team Dashboard
- My Profile

PEOPLE

- Employees
- Sync from CRM
- Documents

ORGANIZATION

- Organization

ATTENDANCE

- My Attendance
- Team Attendance
- Monthly Register
- Regularizations
- Punch Log
- Import Attendance
- Geo-fences

LEAVE

- My Leave

Payslip · September 2026
Priya Sharma

Search employee, code, mol

Priya Sharma
Head-Operation · HR Admin

PS

← Payslips

Print

Download PDF

Demo Pvt Ltd
Gomti Nagar, Lucknow, Uttar Pradesh

PAYSLIP
September 2026

Employee	Priya Sharma	PAN	ABCPA1234K
Employee ID	Admin	UAN	100200300401
Designation	Head - Operations	Bank	HDFC Bank ·6781
Department	Operations	Tax regime	New
Branch	Lucknow HO		
Date of joining	23/09/2020		

Month days	Payable days	Present	Paid leave	LOP	Weekly off / holidays
30	30	26	0	0	4 / 0

Earnings	Rate	Amount (₹)	Deductions	Amount (₹)
Basic Salary	75,000	75,000	Provident Fund (Employee)	1,800
House Rent Allowance	37,500	37,500	Income Tax (TDS)	11,152
Conveyance Allowance	1,600	1,600		
Medical Allowance	1,250	1,250		
Special Allowance	27,850	27,850		
Reimbursement · Client visit travel bills		1,850		
Gross earnings		1,45,050	Total deductions	12,952

Net pay
One Lakh Thirty Two Thousand Ninety Eight Rupees Only
₹1,32,098

Employer contributions (not part of take-home): Employer PF (EPF) ₹550 · Employer Pension (EPS) ₹1,250 · EDLI ₹75 · PF admin charges ₹75

This is a computer-generated payslip and does not require a signature.

Authorised signatory

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Payslip with earnings, deductions, employer contributions and net pay in words. Downloadable as PDF.

**Salary components & formulas**

Earnings, deductions and employer contributions, each with its own formula and statutory flags.

**Monthly payroll run**

Payable days, LOP and overtime from attendance → calculate → review → lock. Hold or release individual employees.

**Loans & advances**

EMI schedules deducted automatically each month until closed.

**Salary structures**

CTC-based templates (Basic, HRA, allowances) applied to employees, with revision history and effective dates.

**Adjustments**

Bonus, incentive, arrears, reimbursement and recovery added to the month with a reason.

**Payslips & registers**

Self-service payslips, maker-checker approval, salary register and bank transfer sheet export.



05 STATUTORY

Tax & Compliance

Never miss a due date. Statutory deductions are calculated from configurable rules, and a compliance calendar tracks every payment and filing with owners and proof.

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Geo-fences

LEAVE

My Leave

Compliance Dashboard

Compliance

Statutory due dates, filings and payments

Search employee, code, mol

Priya Sharma

Head-Operation · HR Admin

PS

1 compliance item(s) overdue. Professional Tax – Maharashtra (payment & return) (September 2026)

Add task

Calendar

Statutory reports

Tax declarations

Generate FY 2026-27 tasks

Overdue

Due today

Due in 7 days

Due this month

Completed this month

Open tasks

Alerts (due within reminder days)

TDS on salary – deposit (Challan 281)

5d

By category

Category	Open	Overdue	Done
ESI	2	0	0
PF	1	0	1
PT	1	1	0
TDS	3	0	0

Overdue

DUE	COMPLIANCE	PERIOD	RESPONSIBLE	AMOUNT	STATUS	FILED / REF
30/09/2026 2d late	Professional Tax – Maharashtra (payment & return) PT · PT-MH	September 2026	–	–	Overdue	

Upcoming (45 days)

DUE	COMPLIANCE	PERIOD	RESPONSIBLE	AMOUNT	STATUS	FILED / REF
07/10/2026 in 5d	TDS on salary – deposit (Challan 281) TDS · TDS-281	September 2026	–	–	Pending	

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Overdue and upcoming PF, ESI, PT and TDS items with category-wise status.



PF, ESI, PT & TDS

EPF, EPS, EDLI and admin charges; ESI; state-wise Professional Tax slabs; monthly TDS projection.



Tax declarations

Employees declare 80C, 80D, HRA and more; HR verifies; TDS updates automatically.



Compliance calendar & tasks

Due dates generated for the year, owner, amount, status, reference and proof for each task.



Old vs new tax regime

Employee regime choice, projected annual tax and month-wise deduction.



Statutory reports

PF ECR file, ESI, PT and TDS by month, quarter or financial year, plus each employee's annual tax statement.



Rules with effective dates

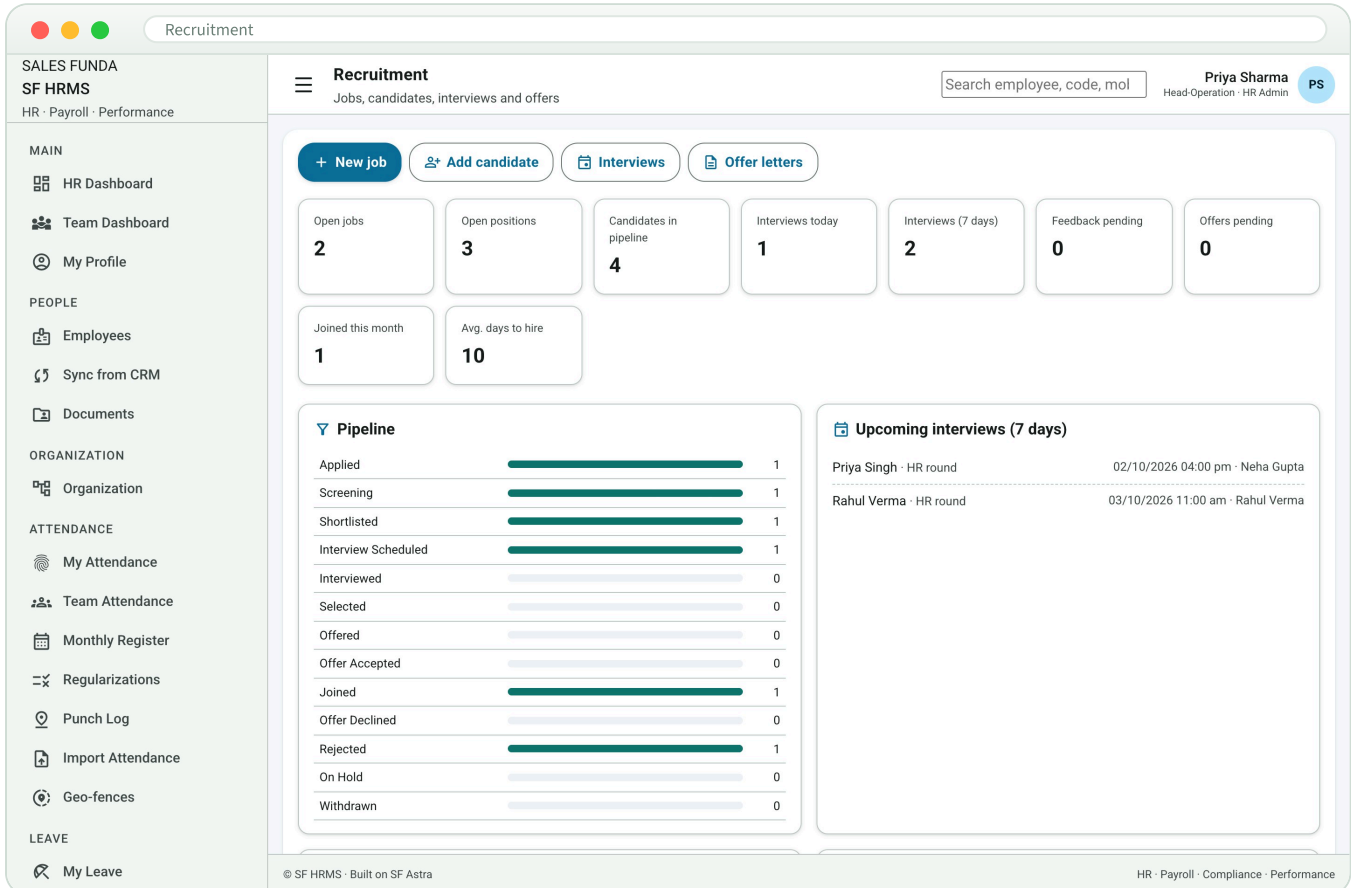
Rates and slabs are configuration rows, so statutory changes need no software update.



06 TALENT ACQUISITION

Recruitment

Run hiring from job opening to joining day. Every candidate moves through a clear pipeline, interviewers record feedback, and selected candidates become employees in one click.



Recruitment dashboard with open positions, pipeline by stage and upcoming interviews.



Job openings

Department, branch, vacancies, experience, salary range, job type and status.



Interviews

Schedule rounds, assign interviewers, capture score, feedback and recommendation.



Convert to employee

Accepted offers become employee records with salary assigned. No re-entry.



Candidate pipeline

Applied → Screening → Shortlisted → Interview → Offered → Accepted → Joined, with full stage history.



Offer letters

Offer letter with salary breakup generated from your template and CTC.



Hiring analytics

Funnel, sources, time to hire, offer acceptance and joining conversion per job.



07 DOCUMENTS & SEPARATION

Letters & Exit

Professional HR letters in seconds from your own templates, and a structured exit process from resignation to full & final settlement.

SALES FUNDA

SF HRMS

HR · Payroll · Performance

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Sync from CRM

Documents

ORGANIZATION

Organization

ATTENDANCE

My Attendance

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Monthly Register

Regularizations

Punch Log

Import Attendance

Geo-fences

LEAVE

My Leave

Offer letter

Offer letter · OFR/2026/0001

Suresh Kumar

Search employee, code, mol

Priya Sharma

Head-Operation · HR Admin

PS

← Back

Accepted v1

Regenerate (new version)

Email

Print

Download PDF

Offer accepted on 02/10/2026. Open candidate → Convert to employee

Demo Pvt Ltd

Gomti Nagar, Lucknow, Uttar Pradesh

Ref: OFR/2026/0001

Date: 02/10/2026

Suresh Kumar

Lucknow, Uttar Pradesh

Subject: Offer of employment – Accounts Executive

Dear Suresh,

We are pleased to offer you the position of **Accounts Executive** in the Accounts department of Demo Pvt Ltd at Lucknow. You will report to Rahul Verma.

Your annual Cost to Company (CTC) will be **₹4,50,000** (Rupees Four Lakh Fifty Thousand only). The salary breakup is given below.

Component	Monthly (₹)	Annual (₹)
Earnings		
Basic Salary	18,750	2,25,000
House Rent Allowance	9,375	1,12,500
Conveyance Allowance	1,600	19,200
Medical Allowance	1,250	15,000
Performance Bonus (annual)	—	60,000
Employer contributions		
PF (Employer)	1,800	21,600
Cost to Company (CTC)	27,500	4,50,000

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Offer letter generated from a template with the CTC breakup filled in automatically.



Letter templates

Offer, appointment, confirmation, increment, promotion, relieving and experience letters with placeholders.



Resignation workflow

Employee resigns → manager → HR approval with notice period and last working day.



Exit interview

Structured feedback on reasons for leaving, visible to HR only.



Generate, version & share

Preview, PDF, print and email. Every version is kept on the employee profile.



Clearance checklist

IT, admin, finance and HR clearances tracked before the last day.



Full & Final settlement

Final salary, leave encashment, gratuity, notice recovery and loan balances, then mark paid.



08 PERFORMANCE

Performance Management

Set clear KPIs and goals, review fairly with a transparent score, and act on results with increments, promotions, training or improvement plans.

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LEAVE

My Leave

KPI Library

KPI templates by department, designation or employee

Search employee, code, mol

Priya Sharma

Head-Operation · HR Admin

PS

All (18)

Sales (6)

Support (1)

HR (3)

Operations (2)

Finance (4)

Quality (2)

Search KPI, departme

Export CSV

New KPI

KPI	CATEGORY	APPLIES TO	TARGET	METHOD	FREQUENCY	WEIGHT	STATUS
Bank reconciliation pending KPI-0015	Finance	Accounts	2 Days	Lower is better	Monthly	30	Active
Collection KPI-0006	Finance	Sales · Sales Manager	₹40,00,000	Higher is better	Monthly	30	Active
Statutory returns filed on time KPI-0014	Finance	Accounts	100 %	Higher is better	Monthly	40	Active
Vendor payments on time KPI-0016	Finance	Accounts	95 %	Higher is better	Monthly	30	Active
Employee profile completeness KPI-0013	HR	Human Resources	95 %	Higher is better	Monthly	30	Active
Payroll processed on time KPI-0012	HR	Human Resources	1	Yes / No	Monthly	35	Active
Time to hire KPI-0011	HR	Human Resources	30 Days	Lower is better	Monthly	35	Active
Process compliance KPI-0017	Operations	Operations	95 %	Higher is better	Monthly	50	Active
Tasks delivered on time KPI-0008	Operations	IT	90 %	Higher is better	Monthly	40	Active
Bugs reopened KPI-0009	Quality	IT	3	Lower is better	Monthly	30	Active
Customer satisfaction (CSAT) KPI-0010	Quality	Operations	4.5 Rating	Higher is better	Monthly	50	Active

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KPI library by department and designation, with target, method, frequency and weightage.

- 

KPI library

Targets in numbers, ₹, %, days or yes/no; higher- or lower-is-better; scaled to the review period.
- 

Review cycles

Self review → manager rating → HR review → finalised score and rating band.
- 

360° feedback

Manager, self, peers and team members, named or anonymous.
- 

Improvement plans (PIP)

Targets, checkpoint reviews, extension and outcome recorded.

- 

Goals at every level

Individual, team, department and company goals. Employees update progress; managers approve.
- 

Transparent scoring

Weightage for KPI, goals, attendance, quality, manager rating and 360° feedback. Your rating scale.
- 

Competencies & skill gaps

Required vs current level with coaching and training recommendations.
- 

Increments & promotions

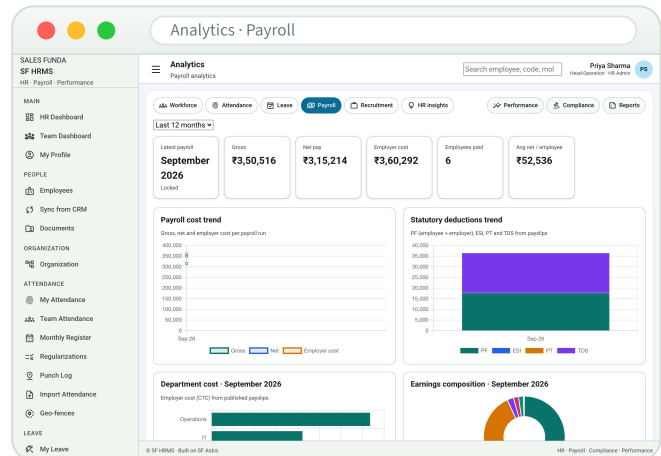
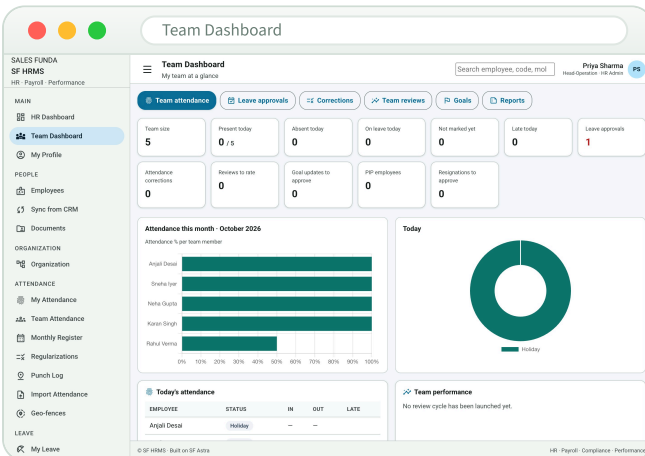
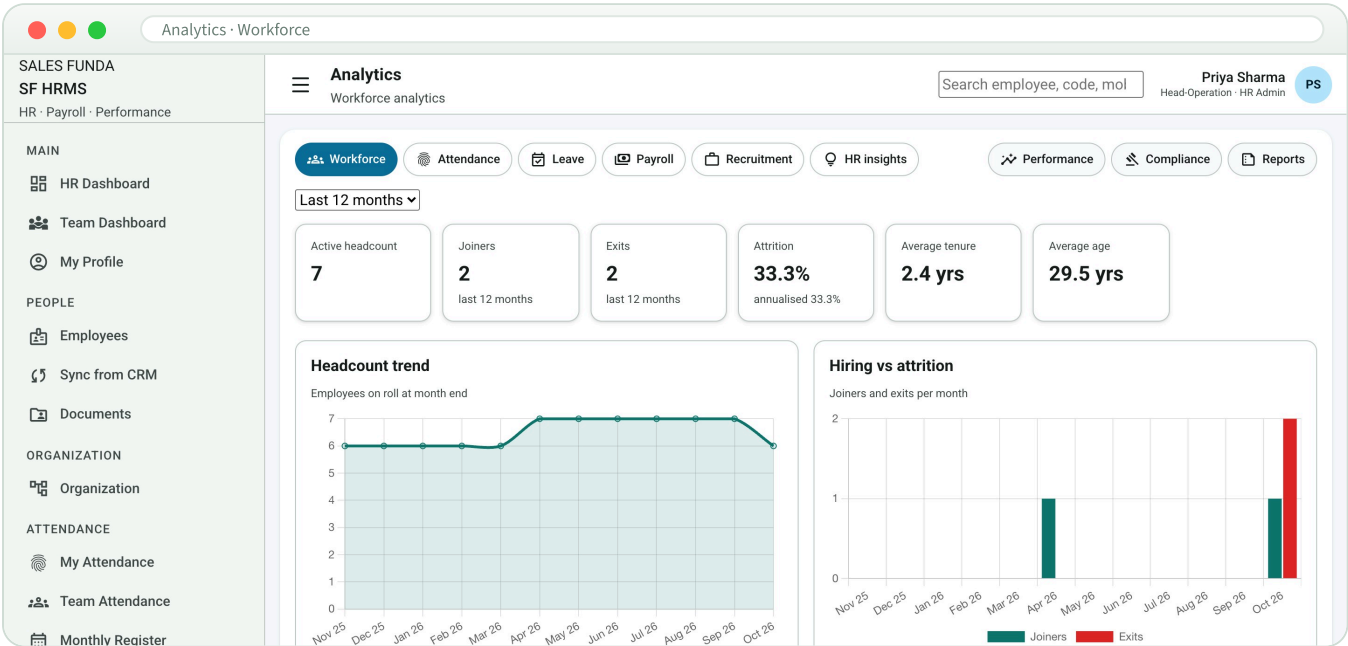
Proposal → management → HR approval → salary revision and letter, never changed silently.



09 INSIGHTS

Dashboards & Analytics

Every role starts the day with the right numbers. HR gets company-wide dashboards and analytics; managers get a team dashboard with everything that needs their action.



HR Dashboard

Headcount, joiners and exits, today's attendance, pending approvals, contract expiry, payroll and compliance status, with quick actions.



Workforce & attendance

Headcount trend, attrition, department, tenure, age; attendance %, absenteeism, late and overtime trends.



Team Dashboard for managers

Team attendance today, leave and correction approvals, reviews to rate, PIPs, upcoming leave and birthdays.



HR insights

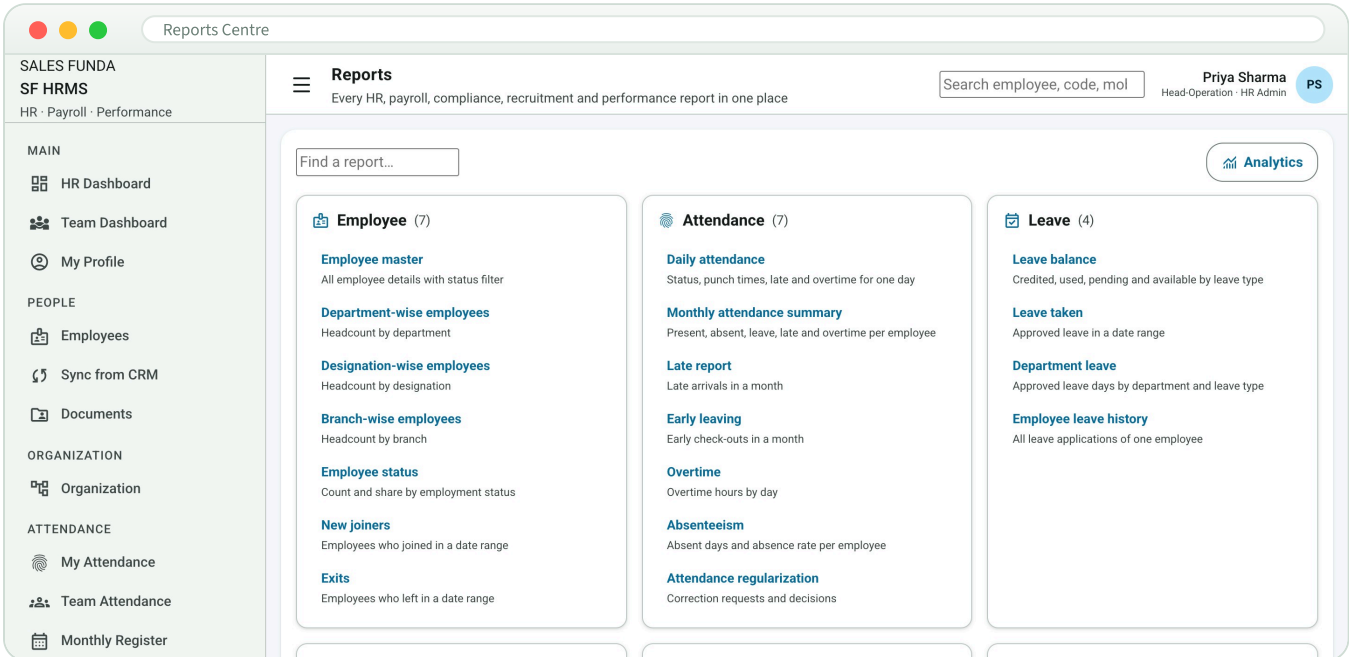
Attendance vs performance, salary vs performance, performance vs attrition and training vs performance.



10 REPORTS & SELF-SERVICE

Reports Centre

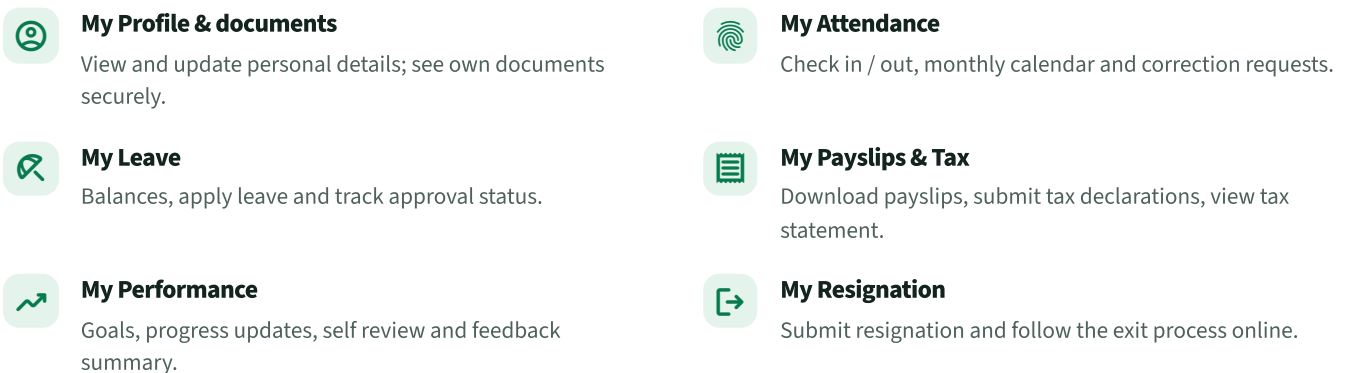
47 ready reports in one place, each with filters, search, sorting, totals and one-click export to Excel, CSV, PDF or print. Managers see their team's reports automatically.



REPORT LIBRARY



EMPLOYEE SELF-SERVICE



TRUST BUILT IN

Roles, security & getting started

Access is decided by role and enforced on the server, not just hidden on screen. Your data stays inside your Sales Funda® account.

WHO SEES WHAT

Area	HR Admin	Manager	Employee
Employee records	All employees	Own team	Self
Attendance & leave	All + final approval	Team + first approval	Self
Payroll, salary & bank	Full access	No access	Own payslips
Tax & compliance	Full access	No access	Own declarations & tax
Recruitment	Full access	Assigned interviews	Assigned interviews
Performance	All cycles & reviews	Team reviews & goals	Own goals & review
Reports & analytics	All reports & analytics	Team reports & dashboard	—

SECURITY



Same Sales Funda® login

QR sign-in from your CRM. Access ends when the CRM session ends.



Server-side row access

Employees can only fetch their own rows; managers only their team's.



Masked sensitive fields

PAN, Aadhaar, bank account and salary hidden from non-HR users.



Audit log

Every create, update, approval and export recorded with user and time.

HOW WE GET YOU LIVE

1

Company setup

Branches, departments, designations, shifts and holidays.

2

Bring your people

Sync users from Sales Funda® CRM and import employee data.

3

Configure policies

Leave rules, salary structures, statutory settings and approvals.

4

Parallel run & go-live

Verify one payroll month with your team, then switch over.

MORE FROM SALES FUNDA®

Other software from our team

Built by Dial N Search Pvt. Ltd., supporting businesses since 2009. Use what you need; it all connects to the same Sales Funda® account.



Sales Funda® — Connected CRM & ERP

Run your business from enquiry to AMC in one system: CRM & sales (enquiry, quotation, proforma, sales order), GST billing & accounts, purchase, inventory, expenses, delivery & installation, and service & AMC, across multiple companies and branches.

www.salesfunda.com



SF Astra — AI Business Assistant

Ask questions about your Sales Funda® data in plain language and run custom business apps like SF HRMS on the same login.

astra.salesfundaa.com



Real Estate CRM

Projects and unit inventory, leads and site visits, bookings, payment schedules and channel partner management.

[Ask for a demo](#)



Travel CRM

Enquiries, itineraries and packages, bookings, supplier details and customer follow-ups in one place.

[Ask for a demo](#)



Manufacturing ERP

Bill of materials, production planning, raw material and finished goods stock, purchase, quality and dispatch.

[Ask for a demo](#)



FQRS — Security Testing

Test and strengthen the security of your applications and systems.

www.fqrs.co.in



SF Prep — Smart Exam Practice

Mock tests in a real exam-style interface, daily practice, chapter-wise practice from your books and results analysis. WhatsApp sign-in; school accounts available.

prep.fqrs.co.in



See SF HRMS on your own workflows.

Book a free demo. We'll walk you through attendance, leave, payroll and performance on real screens, set up the way your company works.



CALL US

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WEBSITE

www.salesfunda.com