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Introduction to Payroll in Tally ERP 9

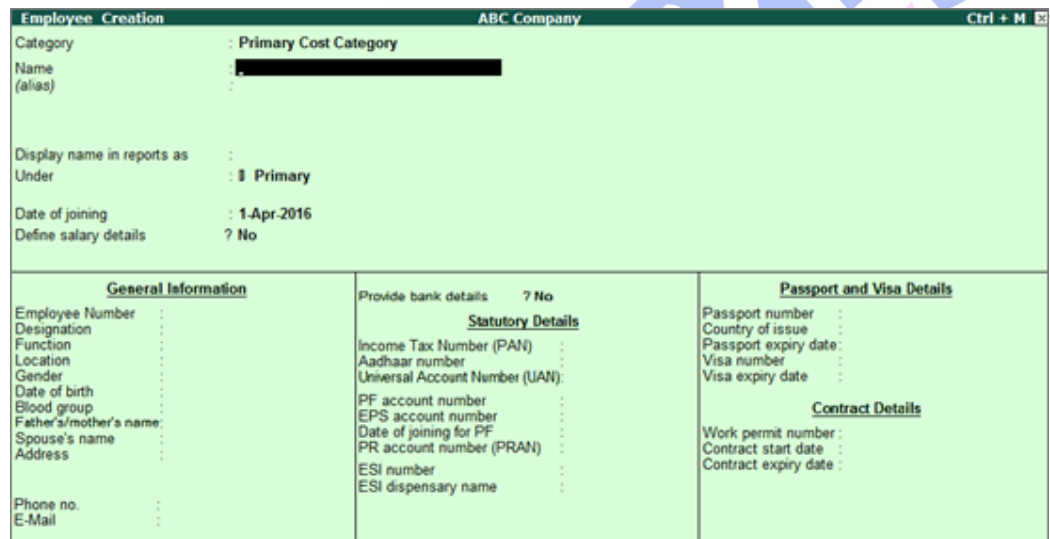
Payroll Management in Tally ERP 9 is a comprehensive solution designed to streamline and automate the payroll process for businesses. It integrates seamlessly with the accounting functions in Tally, ensuring accurate and efficient management of employee-related financial data.

Create Employees (Payroll)

The Employee Master in Tally.ERP 9 can be used record all employee-related information. In addition to general information, you can also enter Payment, Statutory, Expat and Contract details of employees. To enter Statutory related information in the Employee Master, enable the option Show Statutory Details in the Payroll Configurations screen.

Create Single Employee

1. Go to Gateway of Tally > Payroll Info. > Employees > Create (under Single Employee).



The screenshot shows the 'Employee Creation' window in Tally ERP 9. The window title is 'ABC Company'. The 'Category' is set to 'Primary Cost Category'. The 'Name (alias)' field is filled with a redacted name. The 'Display name in reports as Under' is set to 'Primary'. The 'Date of joining' is '1-Apr-2016' and 'Define salary details' is 'No'. The form is divided into three main sections: 'General Information', 'Statutory Details', and 'Passport and Visa Details'. 'General Information' includes fields for Employee Number, Designation, Function, Location, Gender, Date of birth, Blood group, Father's/mother's name, Spouse's name, and Address. 'Statutory Details' includes fields for Income Tax Number (PAN), Aadhaar number, Universal Account Number (UAN), PF account number, EPS account number, Date of joining for PF, PR account number (PRAN), ESI number, and ESI dispensary name. 'Passport and Visa Details' includes fields for Passport number, Country of issue, Passport expiry date, Visa number, and Visa expiry date. There is also a 'Contract Details' section with fields for Work permit number, Contract start date, and Contract expiry date.

2. Enter the Name of the employee. By default, the system displays the same value in the Display name in reports as .

3. Modify the Display name in reports as , if required.

4. Select the Employee Group in the field Under.

5. Enter the Date of joining.

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11. Press Enter to save.

Note: For International Companies, only Income Tax Number option is available under Statutory Details. For UAE, only Labour Card Number, Emirates ID number and Emirates ID expiry date options is available under Statutory Details.

You can configure the salary structure using the Salary Details screen.

Employee Configuration

1. Click F12: Configure to change the default display for the Employee Creation screen.

<u>Employee Configuration</u>	
Provide aliases along with name	? Yes
Provide language aliases for name	? No
Add notes for employees	? No
Show statutory details	? Yes
Provide passport and visa details	? Yes
Provide contract details	? Yes
Show employee display name	? No

2. Set the option Provide alias along with name? to Yes to add aliases for the employee.

3. Set the option Provide language aliases for name? to Yes to add the aliases in other languages as selected (only while using Multilingual feature)

4. Set the option Add notes for employees? to Yes to add notes or remarks for an employee.

5. Set the option Show statutory details? to Yes to enter the PAN, PF, PR, EPS Account Number, the Date of Joining and Relieving.

6. Set the option Provide passport and visa details? to Yes to enter the passport and visa details of the employee.

7. Set the option Provide contract details? to Yes , to enter contract details such as Work Permit Number, Contract Start Date and End Date.

8. Set the option Show employee display name? to Yes , to print a different name for an employee while printing reports. This option is useful the same name is shared by a number of employees.

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9. Press Ctrl+A to accept.

Create Multiple Employees

1. Go to Gateway of Tally > Payroll Info. > Employees > Create (under Multiple Employees).

2. Select the employee group under which you want to create all the employees, in the Under Employee Group field. If an independent employee is to be created, select All Items in this field.

3. Select the employee category in which you want to add the group, in the Category field. The default category Primary Cost Category appears selected in this field.

4. Specify the name of the employee in the Employee Name field.

5. Select the employee group into which you want to add the employee in the Under field.

6. Enter the joining date of the employees in the Date of Joining field.

The Multi Employee Creation screen appears, as shown below, displaying the details of employees you added.

S.No.	Category	Employee Name	Under	Date of joining:
1.	Primary Cost Category	Employee B	Sales	5-Apr-2016
2.	Primary Cost Category	Employee C	R&D	1-Jun-2016
3.	Primary Cost Category	Employee D	Sales	1-Sep-2016

7. Press Ctrl+A to accept the changes.