



# DRAFT PROPOSAL

*BUSINESS: Bluepeaksys*

**Products:**

***ZOHO People & Payroll Implementation***

***Along With Integration And Training / Q&A Session***

## Scope Of Work

**Introduction:** ZYENAC SOLUTIONS is pleased to present this proposal for the implementation of Zoho People (Essential HR) & Zoho Payroll (Standard), a powerful human resource management system designed to automate and streamline HR processes. This system provides a centralized platform for managing employee records, onboarding, Time Management, shift scheduling, and HR automation, ensuring improved efficiency and compliance.

### ZOHO People

This implementation will cover the following modules and functionalities:

#### **Employee Database Management**

- Employee Database: A centralized repository for all employee information, including personal details, job roles, departments, and payroll data.
- Multi-Entity Management: Manage multiple business entities under a single Zoho People account, ensuring seamless coordination and oversight.
- Zoho Vault Integration: Securely store and manage HR-related credentials, ensuring restricted access to sensitive employee information.

#### **Document Management**

- Organization & Employee Files: Maintain and manage essential HR documents in a centralized digital repository.
- E-Signature Integration: Implement digital signing capabilities for contracts, policies, and other HR documents.
- ZIA - AI Bot: AI-powered assistant to automate repetitive HR tasks, provide employee assistance, and manage queries efficiently.

#### **Onboarding**

- Candidate Onboarding: Streamline the hiring process with structured workflows, ensuring seamless onboarding for new employees.
- Employee Onboarding: Automate and customize the onboarding experience with predefined tasks and checklists.

#### **Time Off Management**

- Custom Time Off Policies: Define and implement leave policies tailored to organizational requirements.
- Time Off Approvals: Configure multi-level approval workflows to manage leave requests efficiently.
- Leave Grant: Automate leave entitlements and accruals based on employment terms.
- Compensatory Off Management: Track and manage compensatory leaves granted for extra work hours.
- Holiday Tracking: Maintain an organizational holiday calendar and ensure visibility across teams.

#### **Shift Management**

- Shift Creation: Define work shifts for different departments and roles.
- Shift Scheduling: Automate and optimize employee scheduling to enhance workforce productivity.
- Shift Change Request: Enable employees to request shift changes with approval-based workflows.

#### **Automation**

- Approvals: Implement automated approval workflows for various HR processes.
- Workflow Checklist & Tasks: Assign and track HR-related tasks to ensure compliance and efficiency.
- Mail Alert Configuration: Configure automated notifications for important HR updates and events.
- Template Configuration: Customize document and email templates to maintain branding and consistency.
- Custom Functions: Implement tailored automation scripts to meet specific HR requirements.
- Blueprint: Define, standardize, and automate HR workflows to improve operational efficiency.

## **Training Modules**

- HR Training:
  - Number of Sessions: 2 sessions.
  - Training Duration: 45 minutes per session.
  - Q&A Duration: 30 minutes for each session.
  - Total Duration: 2 hours.
- Employee Training:
  - Number of Sessions: 1 session.
  - Training Duration: 30 minutes.
  - Q&A Duration: 15 minutes.
  - Total Duration: 45 minutes.
- Training Deliverables:
  - Comprehensive walkthroughs of implemented systems.
  - Hands-on guidance for key HR and employee activities.
  - Live Q&A sessions to address queries.

## ZOHO Payroll

-  Setting-up Salary Structure
-  Creation of Salary & Email Templates
-  Creation of Salary Components
-  Creation of Statutory Components & Compliance
  - Income Tax
  - Employee Provident Fund (EPF)
  - Employee State Insurance (ESI)
  - State-wise Professional Tax (PT)
  - Labour Welfare Fund (LWF)
-  Departments & Designation
-  Payment Bank Integration (With ZOHO Partnered Banks)
  - HSBC, Yes Bank "Transfer salaries directly to your employees' bank accounts"
-  Complete Employee Information
-  Reimbursements Based on the Plan
  - Statutory bonus
  - Reimbursement proof approval
  - Proof of investments approval
-  Automatic payroll calculation & Automatic payslip generation
-  Proof Of Investments Based on the Plan
-  Salary Revision Based on the Plan
-  Statutory & Tax Reports with other General Reports
-  Form 16 generation with digital signature / Form 24Q, TDS challan recording
-  Pre-defined user roles and permissions
-  One Month pay run processing Support
-  Admin Training
  - Number of Sessions: 2 sessions.
  - Duration: 45 minutes per session.
  - Q&A Session: Included (30 minutes).
  - Total Duration: 2 hours.
-  Employee Training
  - Number of Sessions: 1 session.
  - Duration: 30 minutes.
  - Q&A Session: Included (15 minutes).
  - Total Duration: 45 minutes.

**Integration Scope Between Zoho People, and Zoho Payroll**

- ⊕ People to Payroll Integration
  - Sync employee data from Zoho People to Zoho Payroll, ensuring accurate and up-to-date salary, tax, and compliance details.
  - Integration of leave, attendance, and loss of pay (LOP) data for precise payroll calculations.
  - Auto-updating payroll with changes in employee profiles, designations, or pay structures managed in Zoho People.

**Not Included:** Addition Scope Based on Clients Requirement Can Be Considered In Phase-2

- ⊕ Other ZOHO Applications & Integrations
- ⊕ Advanced Customization & Templates: Advanced integrations or customizations.
- ⊕ Analytics (Custom Reports) & Workflow Automation
- ⊕ 3<sup>rd</sup> Party Integration: Activities or integrations not mentioned in this document, including custom modules or third-party software outside Zoho's ecosystem.

**Process Flow & Dependencies:**

- ⊕ All the data to be provided in Excel Format Or Admin Access of existing application.
- ⊕ Implementation Scope are subject to ZOHO Plan & Its Features.
- ⊕ Further Change Made In The Process Flow: Will be considered as change request and billed accordingly as per Customers Approval.
- ⊕ All the details related to Implementation & Confirmations will be provided by Customer.
- ⊕ Any delay in providing Data or Information will impact the mentioned timelines.
- ⊕ All the mentioned features are Subject To Standalone Application Plan & Its Features.
- ⊕ UAT sign-off to be provided by customer within 7 days of final demo.



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