Staff Khata User Manual

Step-by-step help for every part of Staff Khata, with screenshots: setting up your company, attendance, leave, payroll, reports, the mobile app and the add-ons.

English · Updated October 2026 · staffkhata.com/guide

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01

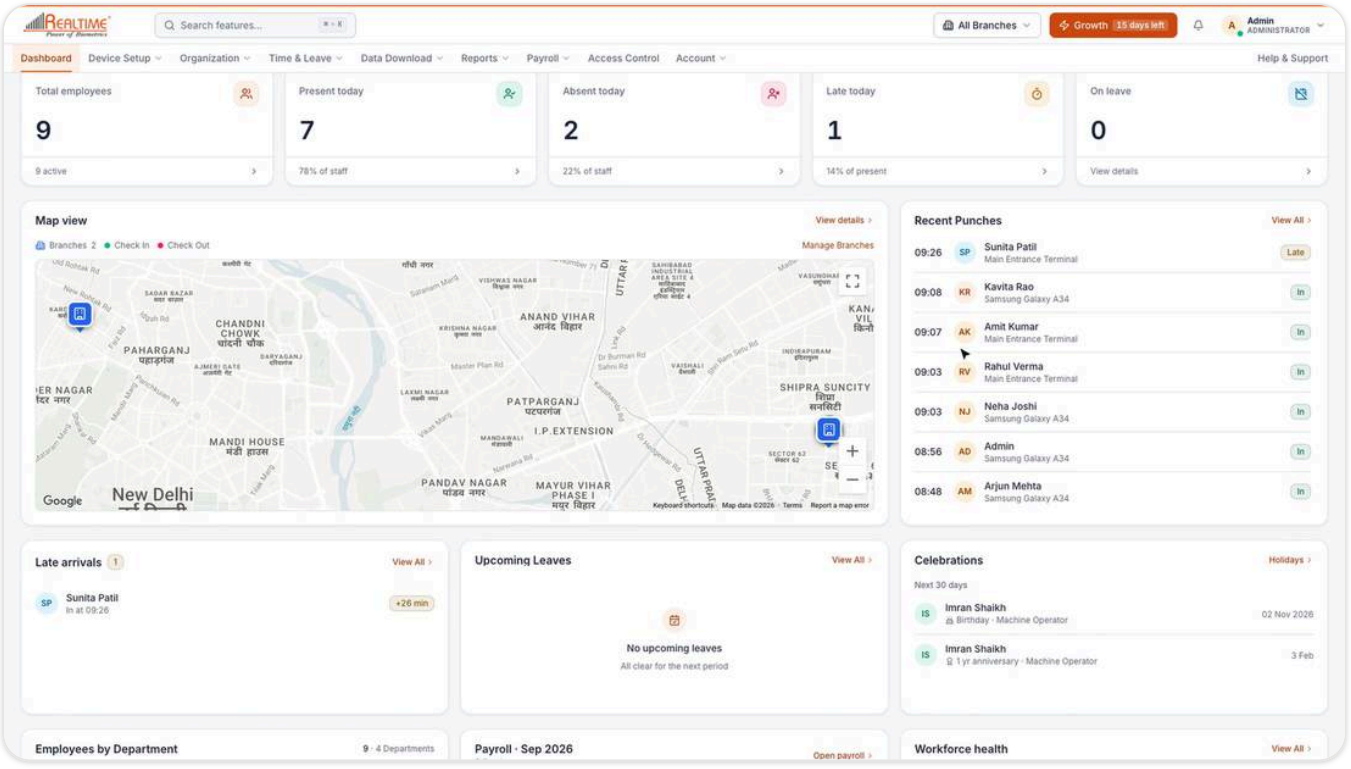
Before you start

Plan: All plans

This chapter explains what Staff Khata is, what you need before you sign up, and who sees what. Read it once, then follow the chapters in order to set up your company.

What Staff Khata does

Staff Khata keeps attendance, leave, payroll and HR for your whole team in one place. Employees punch in from their phone with a selfie and their location, or at a Realtime biometric machine at the door. Staff Khata then applies your office rules, such as grace time, half-days and late marks, so you see who is in, who is late and who is absent in real time. From that attendance it builds leave balances, salaries and payslips, and over thirty reports, including government registers. You can also get a daily summary on WhatsApp without opening the app.



What you need

- **A computer with a current web browser.** Use the latest Chrome, Edge or Safari. The web app is at https://attendance.staffkhata.com. You set up your company and run payroll and reports here.
- **An internet connection** on the computer, and on any phone or machine that sends punches.
- **The Staff Khata mobile app** on Android or iOS, for employees who punch in from their phone. They need location turned on and a working camera for the selfie.
- **Realtime biometric devices**, if you want staff to punch on a fingerprint or card machine. Staff Khata works only with Realtime biometric devices.
- **A work email and a mobile number** that can receive codes. You use both to verify your account when you sign up.

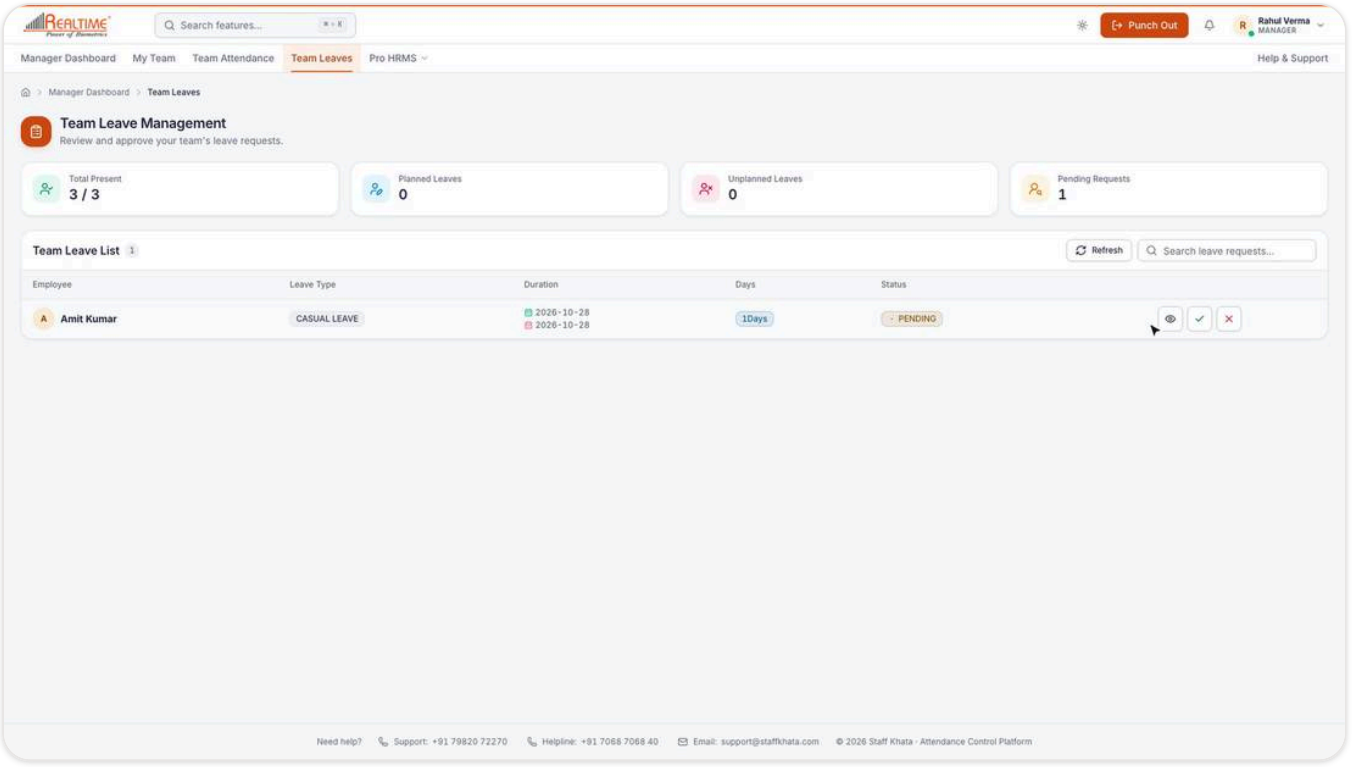
The four roles

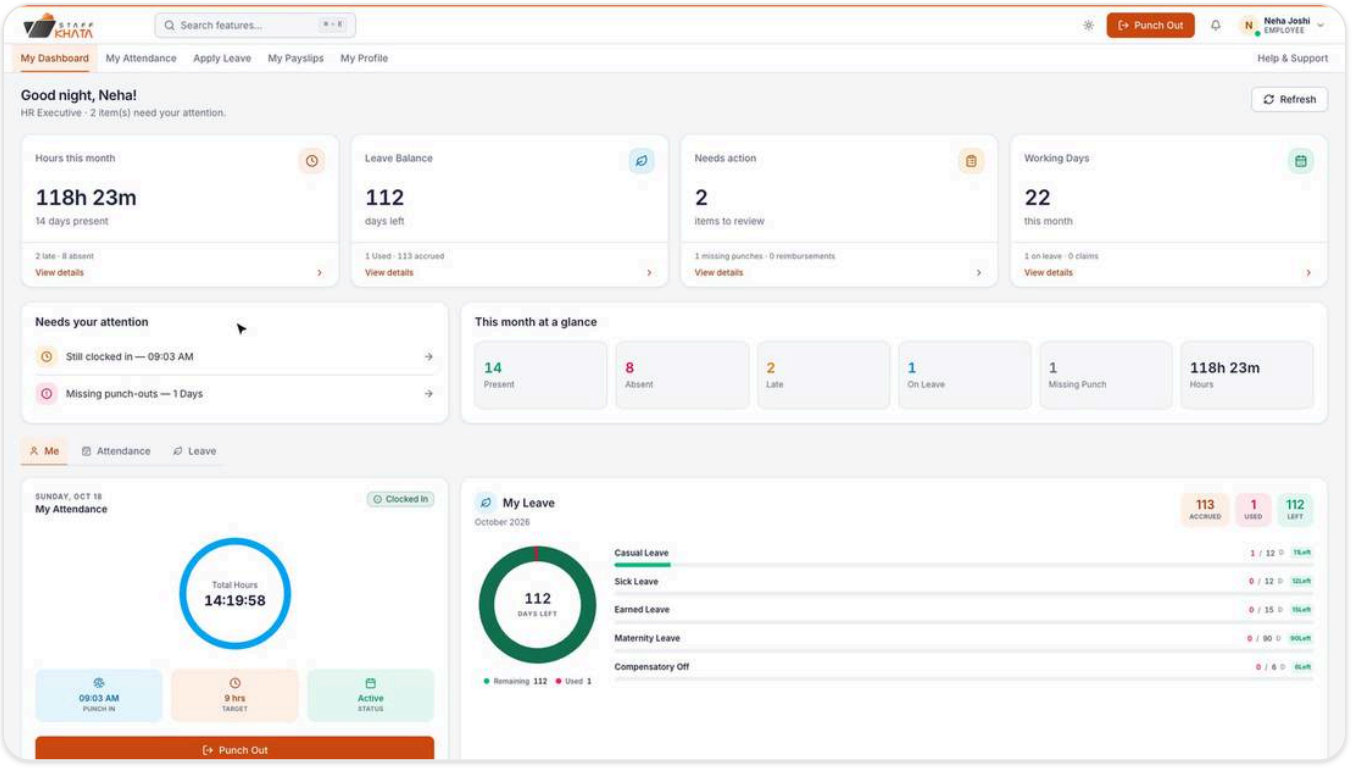
Every person in Staff Khata has a role. The role decides which screens they see after they sign in.

Role	Who it is for	What they see
Admin	The owner or office head	Everything: company setup, employees, devices, attendance, leave, payroll, reports, billing and integrations.
HR	Your HR or accounts person	The same admin screens as the Admin, for day-to-day work on employees, attendance, leave and payroll. Only the Admin sees the plan badge and upgrades.
Manager	A team lead	**My Team**, **Team Attendance** and **Team Leaves**, to approve their own team's requests. Needs the Pro HRMS add-on.
Employee	Every staff member	Their own dashboard, attendance, leave, payslips and profile, on the web and in the mobile app.

You pick the role when you add someone in **Add Employee**. There is also a **Branch Admin** role. A Branch Admin works in the admin screens but cannot manage branches, and can

only add people with the Employee role.





Plans, the trial and add-ons

Every new company starts with a **15-day trial** with every feature unlocked. When the trial ends, your account moves to the entry plan automatically. You can upgrade at any time.

- **Plans** differ in how many users and biometric devices you can have, and in which features are included. Leave, holidays, overtime, payroll, employee login, advanced reports and multiple shifts can be locked on lower plans.
- **Add-ons** are extra modules you buy on top of a plan: **Pro HRMS** (manager approvals, company feed, org tree, assets and more) and **Journey Tracker** (live tracking for field staff). Their menus appear only once the add-on is active.

A locked feature shows a lock icon in the menu. See **Billing & Plan** for current prices and what each plan includes.

> **Plan needed:** If a feature in this manual shows a lock on your account, it needs a higher plan or an add-on. See Plans, billing and support.

How this manual is organised

The chapters follow the order you set things up in. Start at the top and work down.

1. Sign up and first login
2. Company setup
3. Attendance rules
4. Employees
5. Shifts and overtime
6. Mobile punch
7. Biometric devices
8. Daily attendance
9. Leave and holidays
10. Payroll
11. Reports
12. WhatsApp and integrations
13. Employee self-service

14. Journey Tracker
15. Pro HRMS
16. Plans, billing and support
17. FAQ and troubleshooting

> **Tip:** Screenshots in this manual show a fictional example company, Sharma Textiles Pvt Ltd. Your screens show your own company's names and numbers.

02

Sign up and first login

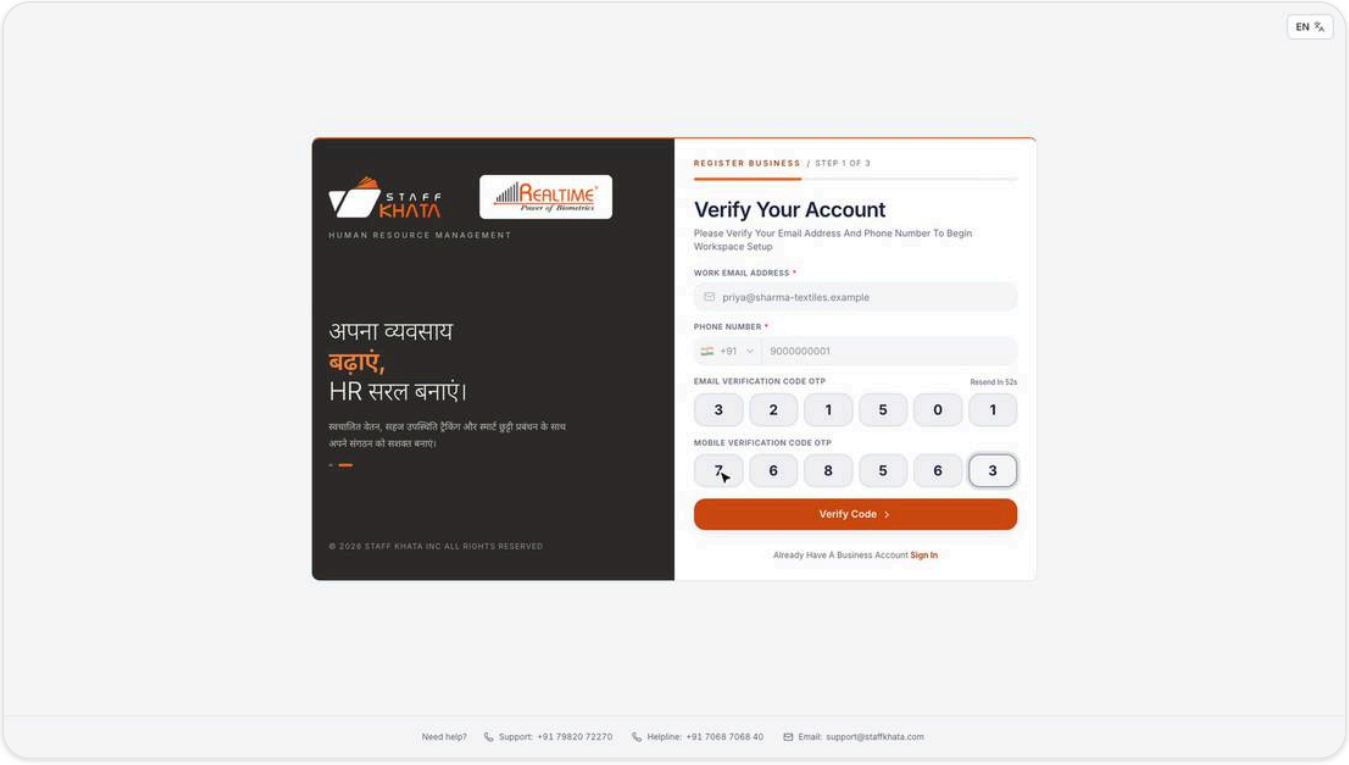
Plan: All plans

Signing up takes a few minutes. You verify your email and phone, enter your company details and set an admin password, and your workspace is ready.

Register your business

Registration has three steps. You can change the language of the page at any time with the language button in the top corner.

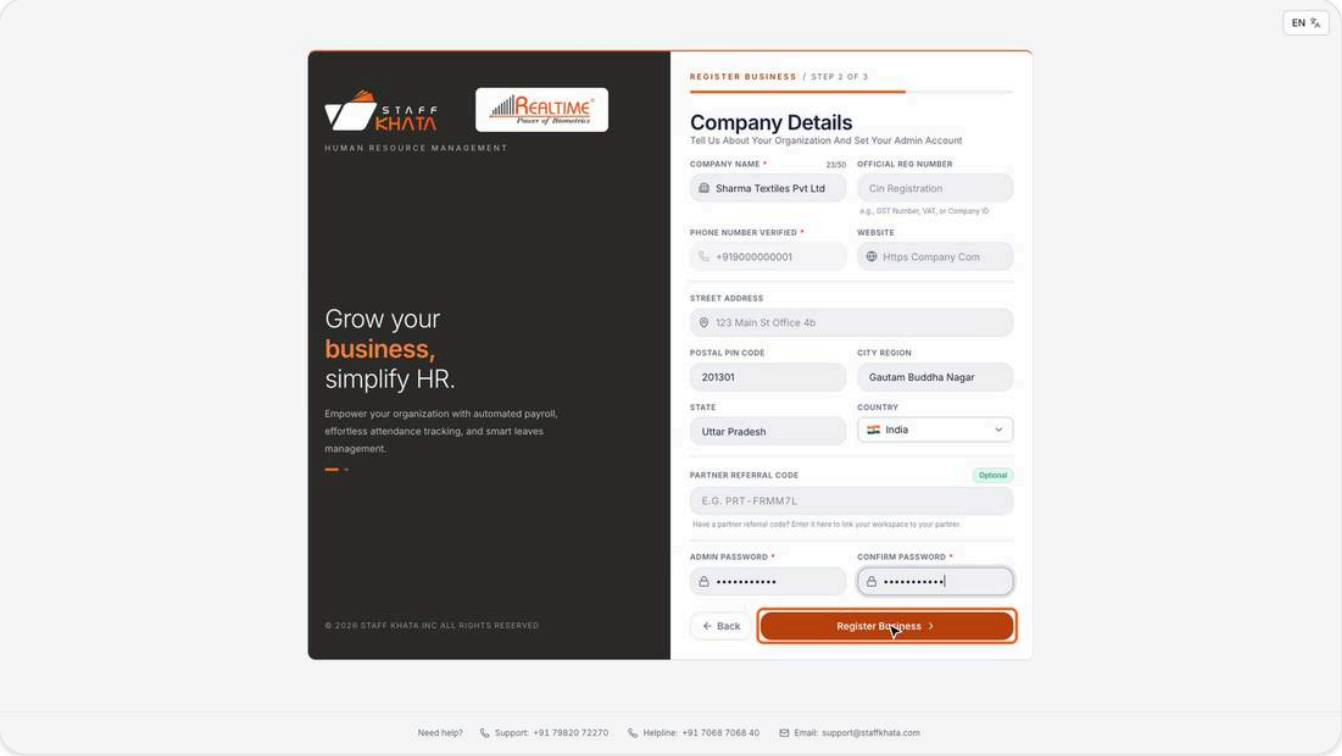
1. Open https://attendance.staffkhata.com and click **Register Your Business**.
2. On **Verify Your Account**, enter your **Work Email Address** and **Phone Number**. Use ones you can check now, because a code is sent to each.
3. Click **Send Verification Code**.
4. You get a 6-digit code by email and another by SMS. Type the email code in the first row of boxes and the phone code in the second row.
5. Click **Verify Code**.



> **Tip:** No code? Wait for the timer to finish, then click **Resend Code**. Codes are valid for 10 minutes.

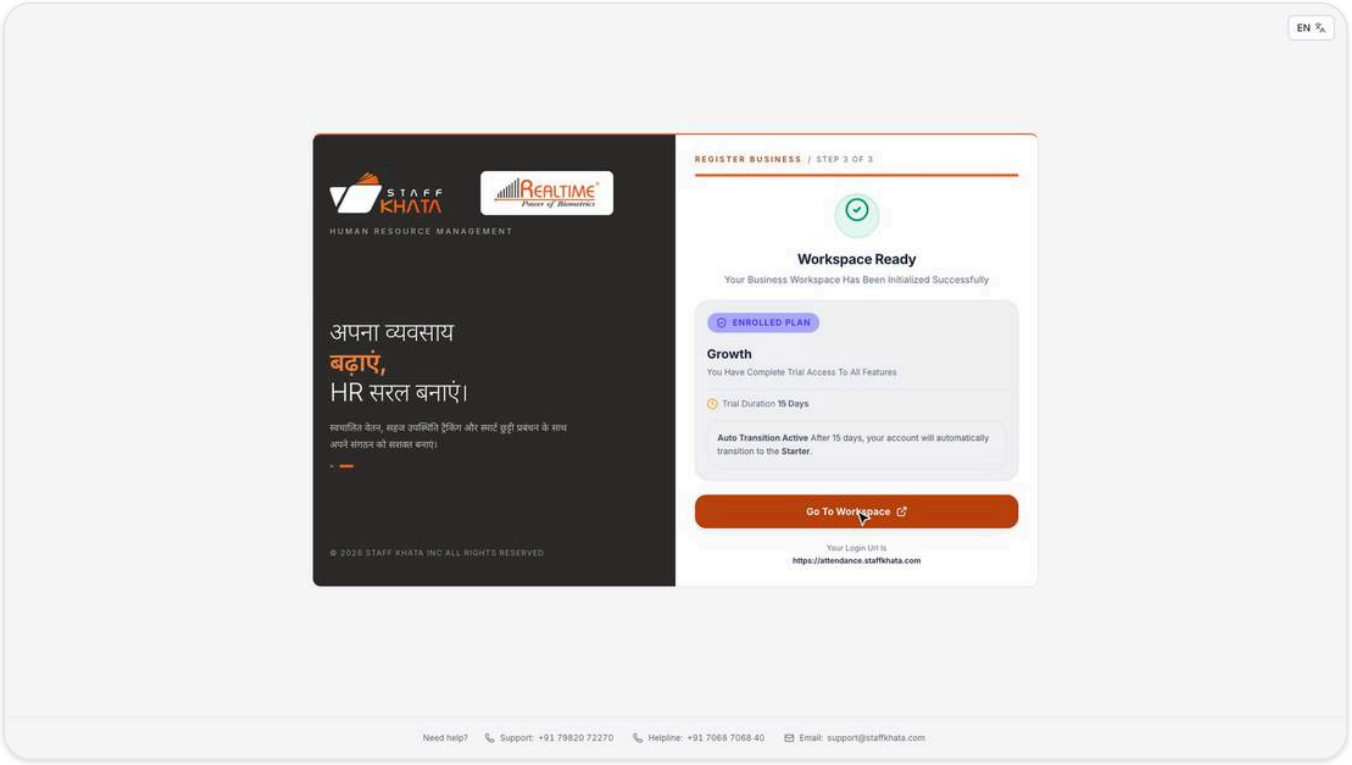
Enter your company details

1. On **Company Details**, type your **Company Name** (3 to 50 characters). This is the only required company field.
2. **Official Reg Number** (such as your GST or CIN), **Website** and **Street Address** are optional. You can add them later in Company setup.
3. Type your 6-digit **Postal Pin Code**. **City Region**, **State** and **Country** fill in for you.
4. If a Staff Khata partner helped you, enter their **Partner Referral Code**. Otherwise leave it empty.
5. Set your **Admin Password** (at least 8 characters) and type it again in **Confirm Password**.
6. Click **Register Business**.



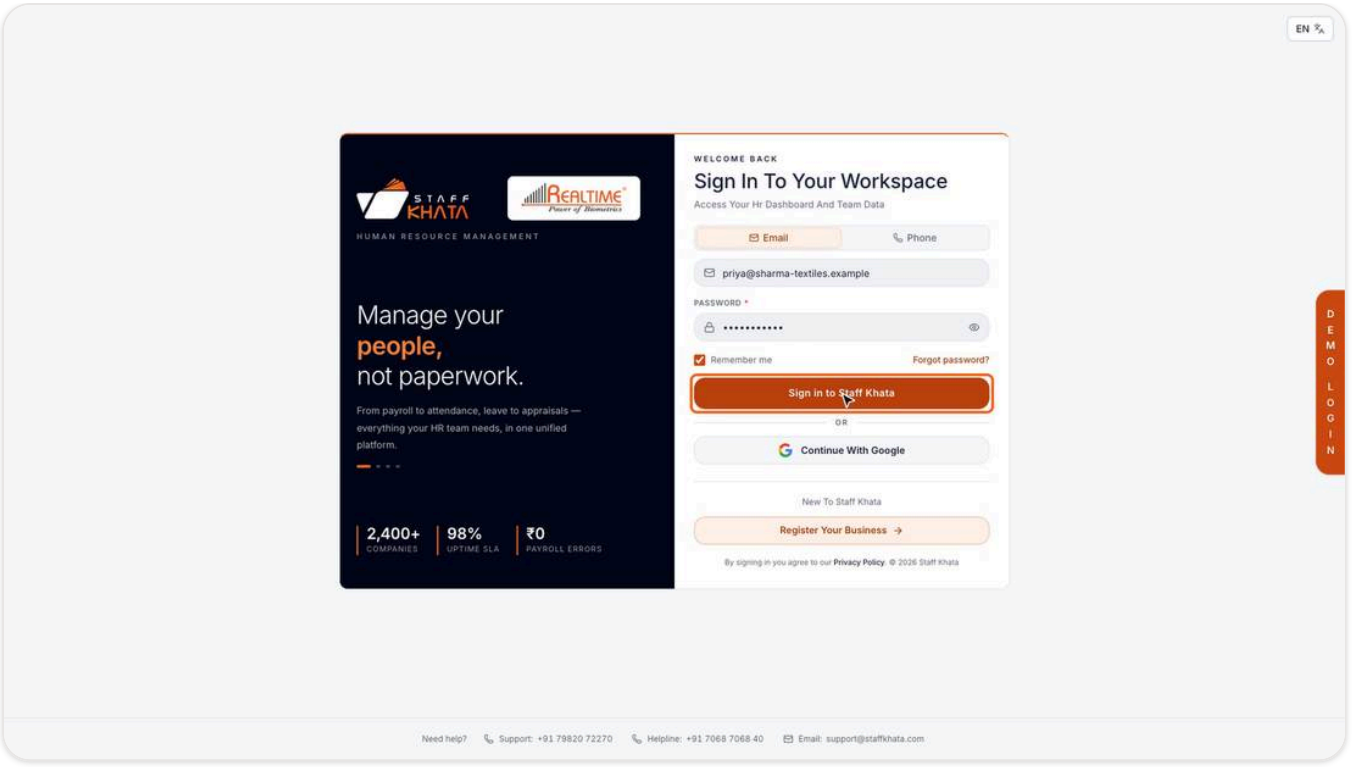
Your workspace is ready

The **Workspace Ready** screen shows your **Enrolled Plan**, the 15-day trial, and the plan your account moves to when the trial ends. During the trial every feature is unlocked. Click **Go To Workspace** to sign in.



Sign in

1. Go to https://attendance.staffkhata.com.
2. Choose **Email** or **Phone**, then enter your work email or mobile number.
3. Enter your password.
4. Tick **Remember me** only on your own computer.
5. Click **Sign in to Staff Khata**.



Your dashboard is empty at first. As you add employees and they punch in, it shows attendance, late arrivals, leave and payroll at a glance. You may also see a banner that says autopay is inactive. That is about billing; see Plans, billing and support.

Find your way around

The bar at the top of every page holds these controls:

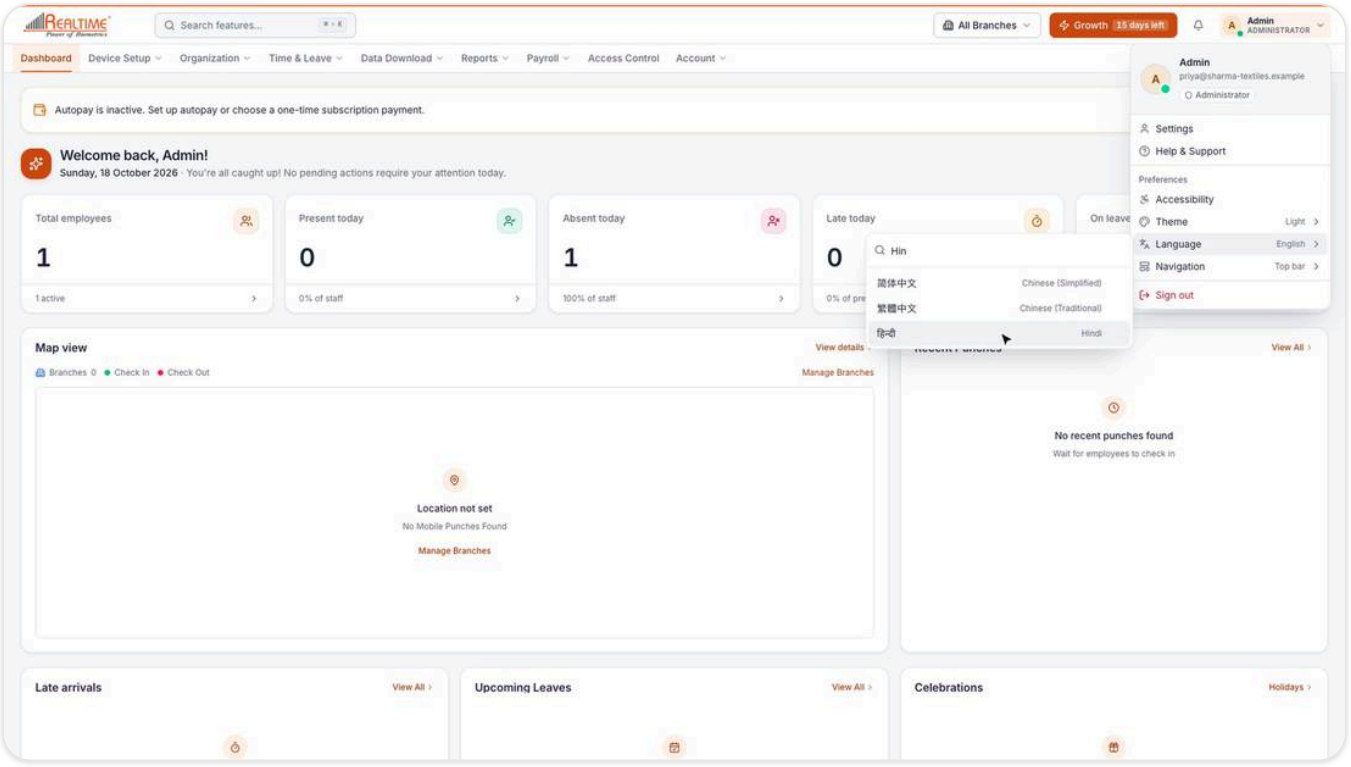
Control	What it does
Menus	**Dashboard**, **Device Setup**, **Organization**, **Time & Leave**, **Reports**, **Payroll** and more. Point to a menu to see its pages.
Search features...	Press **⌘K** on a Mac or **Ctrl+K** on Windows, type what you want (for example "company") and press Enter.
Branch switcher	Shows **All Branches**. Once you have more than one office, pick one branch or view all together.
Plan badge	Your plan name and the trial days left. Click it to manage your plan.
Bell	Notifications: approvals, leave requests and device alerts.

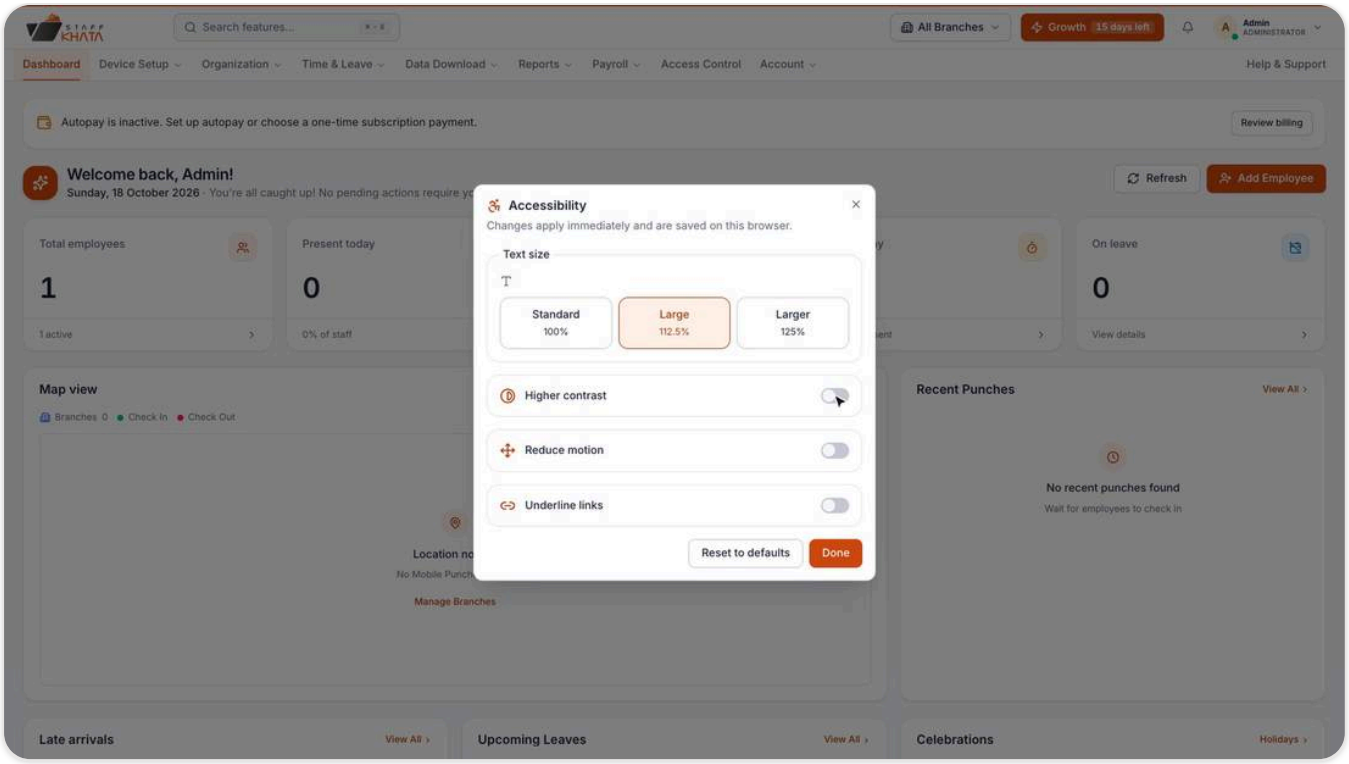
Control	What it does
Help & Support	Opens the support page with contact numbers and tickets.

Set your language, layout and accessibility

Click your name or profile picture at the top right. The menu has **Settings**, **Help & Support** and a **Preferences** section.

- **Language:** Staff Khata works in 55 languages, including Hindi, Marathi, Tamil and Bengali. Click **Language**, type a few letters to search, and pick yours.
- **Navigation:** Choose **Top bar** (menus across the top) or **Sidebar** (menus down the left).
- **Accessibility:** Opens a window where you set **Text size** (**Standard**, **Large** or **Larger**) and turn on **Higher contrast**, **Reduce motion** or **Underline links**. Click **Reset to defaults** to undo, or **Done** to close.





> **Note:** These preferences apply straight away and are saved on this browser only. On another computer, set them again.

Reset a forgotten password

1. On the sign-in page, click **Forgot password?**.
2. Enter your **Work Email Address** and click **Send Reset OTP**.
3. Enter the 6-digit code from the email and click **Verify OTP**. If it does not arrive, click **Resend OTP**.
4. Type a **New Password**, type it again in **Confirm Password**, and click **Reset Password**.
5. On **Password reset!**, click **Sign in now**.

Next, set up your company in Company setup.

03

Set up your company, branches and departments

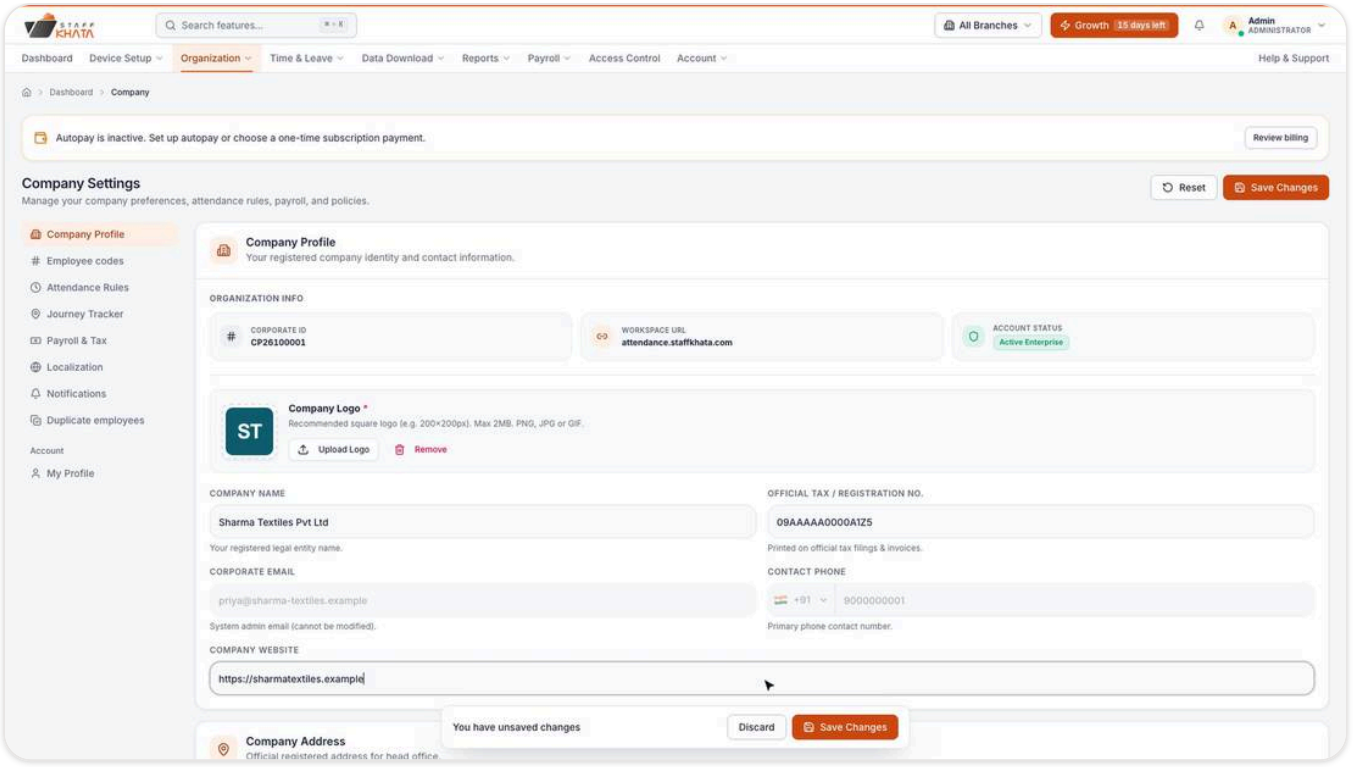
Plan: All plans

Before you add staff, tell Staff Khata about your company. Your profile, employee code format, branches and departments are used on every report, payslip and punch.

Fill in your company profile

Your logo, name and tax number print on reports and payslips, so set them first.

1. Click **Organization** → **Company**. The **Company Settings** page opens on the **Company Profile** tab.
2. At the top, **Organization Info** shows your **Corporate ID** and **Workspace URL**. You cannot change these.
3. Under **Company Logo**, click **Upload Logo** and pick a square PNG, JPG or GIF under 2 MB (200 × 200 px works well).
4. Check **Company Name**, then enter your **Official Tax / Registration No.**, such as your GST number.
5. Add your **Company Website**. Start it with `https://`.
6. Scroll to **Company Address**. Put the street, city, state and postal code in their own fields, so they print correctly on documents.
7. Click **Save Changes**.



> **Note: Corporate Email** is your admin login email and cannot be changed here.

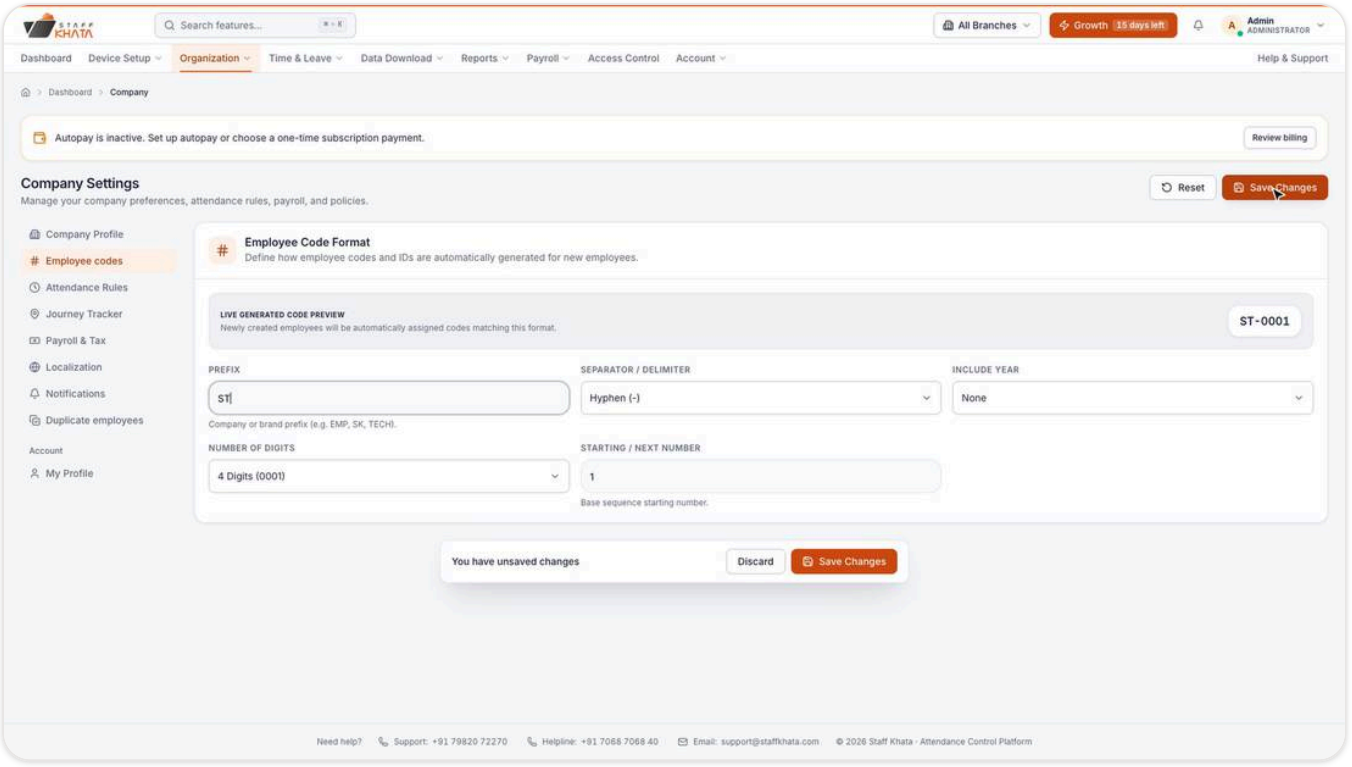
Choose your employee code format

Staff Khata gives every new employee a code automatically. Pick a format that is short and easy to read.

1. In **Company Settings**, open the **Employee codes** tab.
2. Set the fields below. The **Live Generated Code Preview** box updates as you type.
3. Click **Save Changes**.

Setting	What it does
Prefix	Letters at the start, such as `ST` or `EMP`.
Separator / Delimiter	Hyphen, slash, underscore, dot, or none.
Include Year	Adds the year (`2026` or `26`), or **None**.
Number of Digits	How many digits the number has, from 2 to 6.

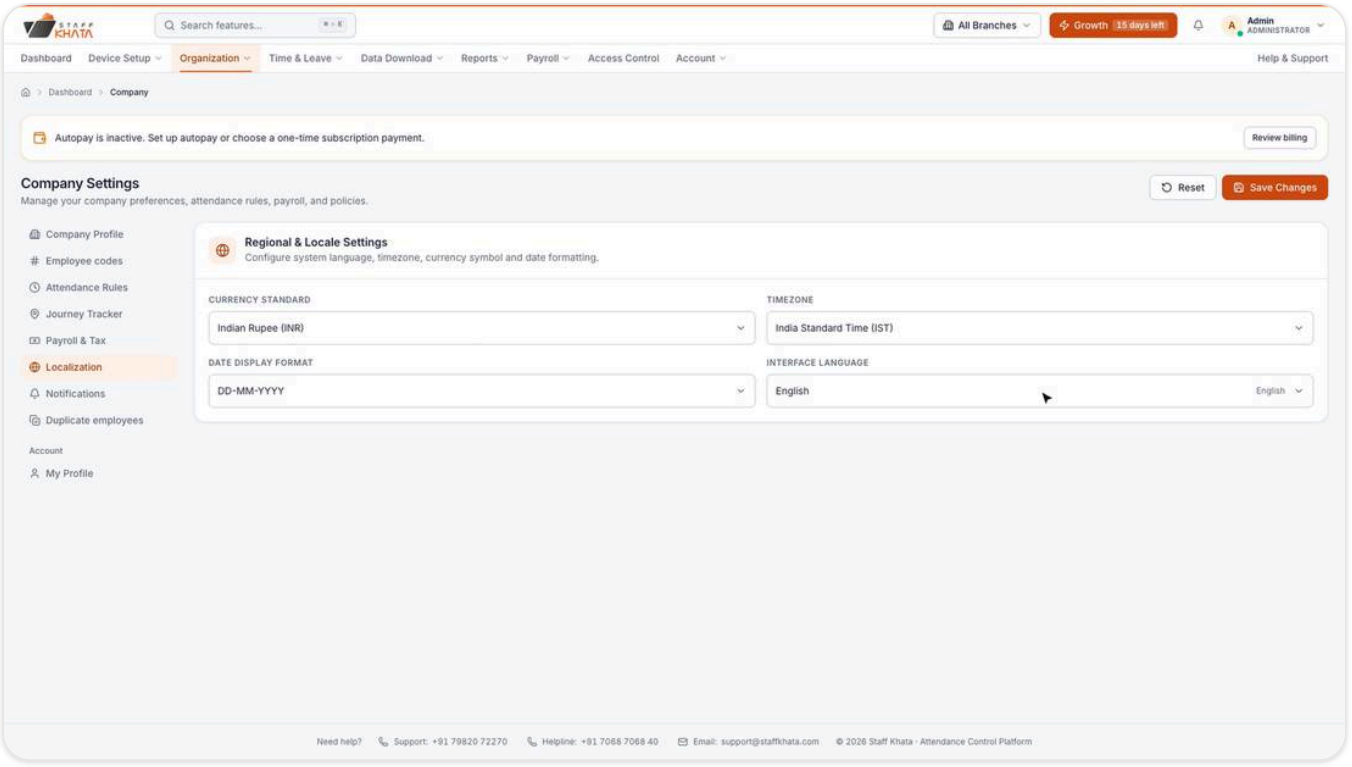
Setting	What it does
Starting / Next Number	The number the next new employee gets.



> **Tip:** Codes are only generated for new employees. Existing codes stay as they are.

Check localization

Open the **Localization** tab. **Currency Standard**, **Timezone**, **Date Display Format** and **Interface Language** are set for India when you sign up. Change them only if your business works differently, then click **Save Changes**.



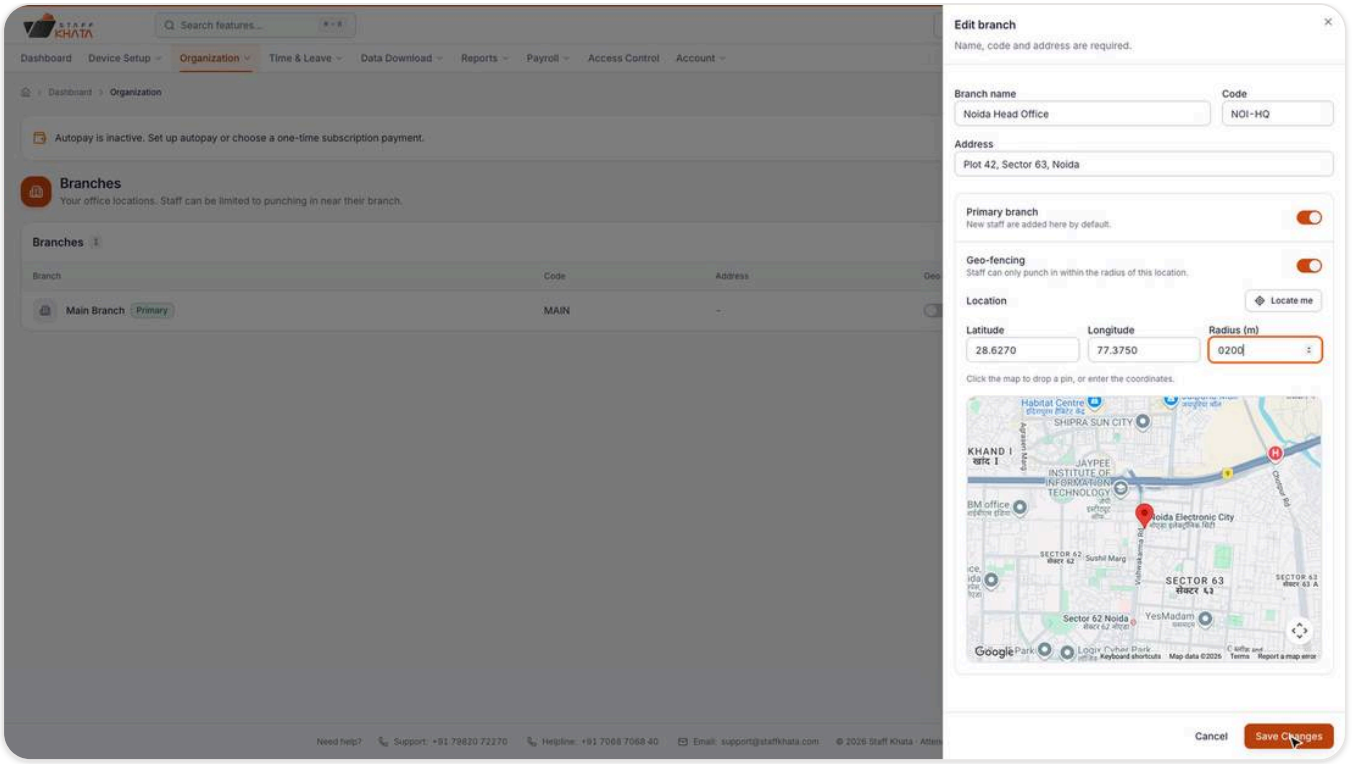
Payroll & Tax tab

The **Payroll & Tax** tab holds your salary cycle (start and end day), PF, ESI and gratuity settings, and your financial year. These are explained in Payroll and salaries.

Add your branches

Branches are your office or factory locations. Each branch can have its own geo-fence, so staff can only punch in near the place they work.

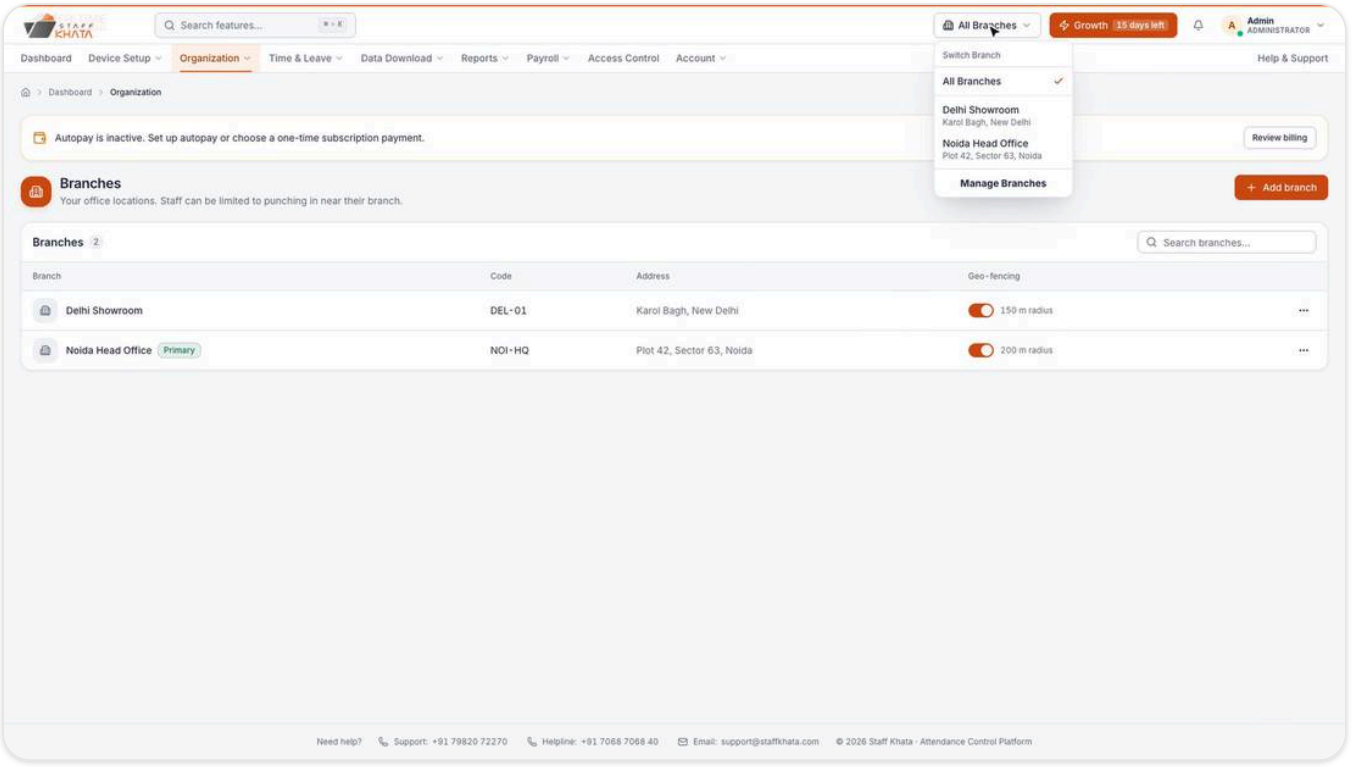
1. Click **Organization** → **Branch**. Your workspace already has a **Main Branch**.
2. Open the row menu (⋯) and click **Edit**.
3. Enter a clear **Branch name**, a short **Code** (for example `NOI-HQ`) and the **Address**.
4. Turn on **Primary branch** if new staff should be added here by default.
5. Turn on **Geo-fencing**. Then set the location: click **Locate me**, type the **Latitude** and **Longitude**, or click the map to drop a pin.
6. Enter the **Radius (m)**: how far from the pin staff can be and still punch in.
7. Click **Save Changes**.



To add another location, click **Add branch**, fill in the same fields and click **Add branch**.

> **Tip:** Use a radius of at least 50 metres. Phone GPS is less accurate indoors, and a very small radius can stop staff from punching in at their own desk.

All branches appear in the list with their geo-fence radius. Use the branch switcher in the top bar (**All Branches**) to see one branch at a time or all together.

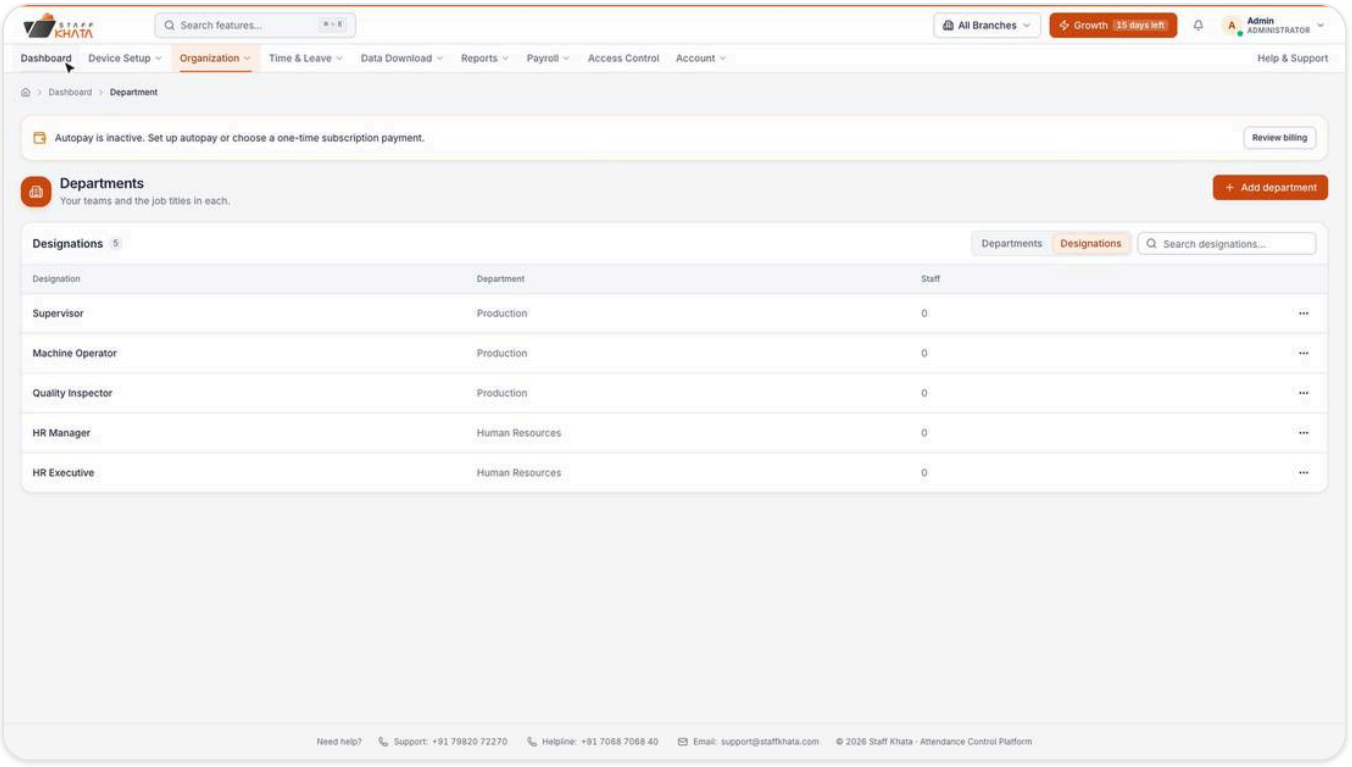


Geo-fencing also has to be switched on for the company. See Attendance rules and office time policy.

Add departments and designations

Departments are your teams. Designations are the job titles inside each team, and they appear on payslips and profiles.

1. Click **Organization** → **Department**. Two departments are created for you.
2. To add job titles to one, open its row menu (⋯) and click **Edit**. Under **Designations**, type a title, click **Add designation** for the next one, then click **Save Changes**.
3. To create a new team, click **Add department**, enter the **Department name**, add its designations and save.
4. Switch the table from **Departments** to **Designations** to see every job title in your company and which department it belongs to.



Next, set your attendance rules and office time policy.

04

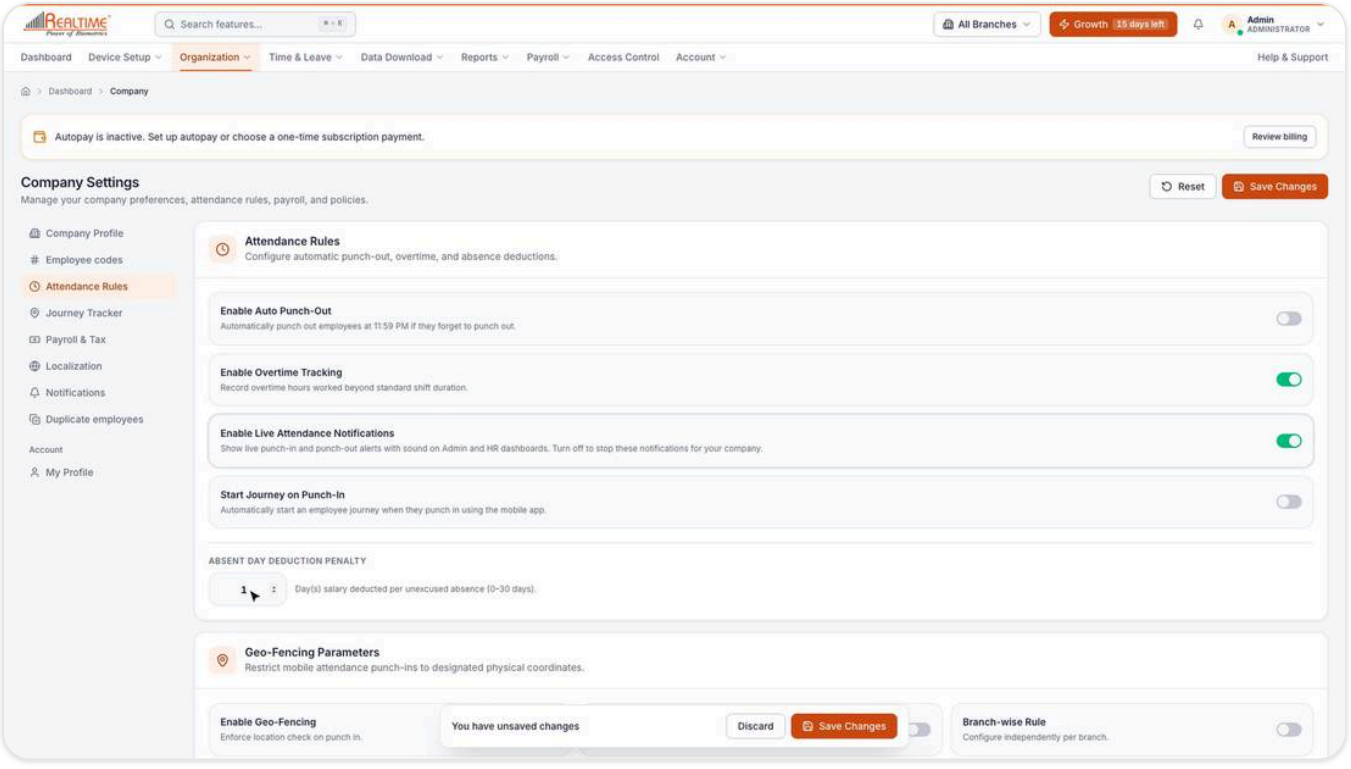
Attendance rules and office time policy

Plan: All plans

Attendance rules decide how Staff Khata treats every punch: what counts as overtime, what an absence costs, and where staff are allowed to punch in. The office time policy decides when someone is late, on a half day or absent.

Set your attendance rules

1. Click **Organization → Company**, then open the **Attendance Rules** tab.
2. Switch on the rules you want (see the table below).
3. In **Absent Day Deduction Penalty**, enter how many days of salary are cut for each unexcused absence. **1** is the usual choice.
4. Click **Save Changes**.



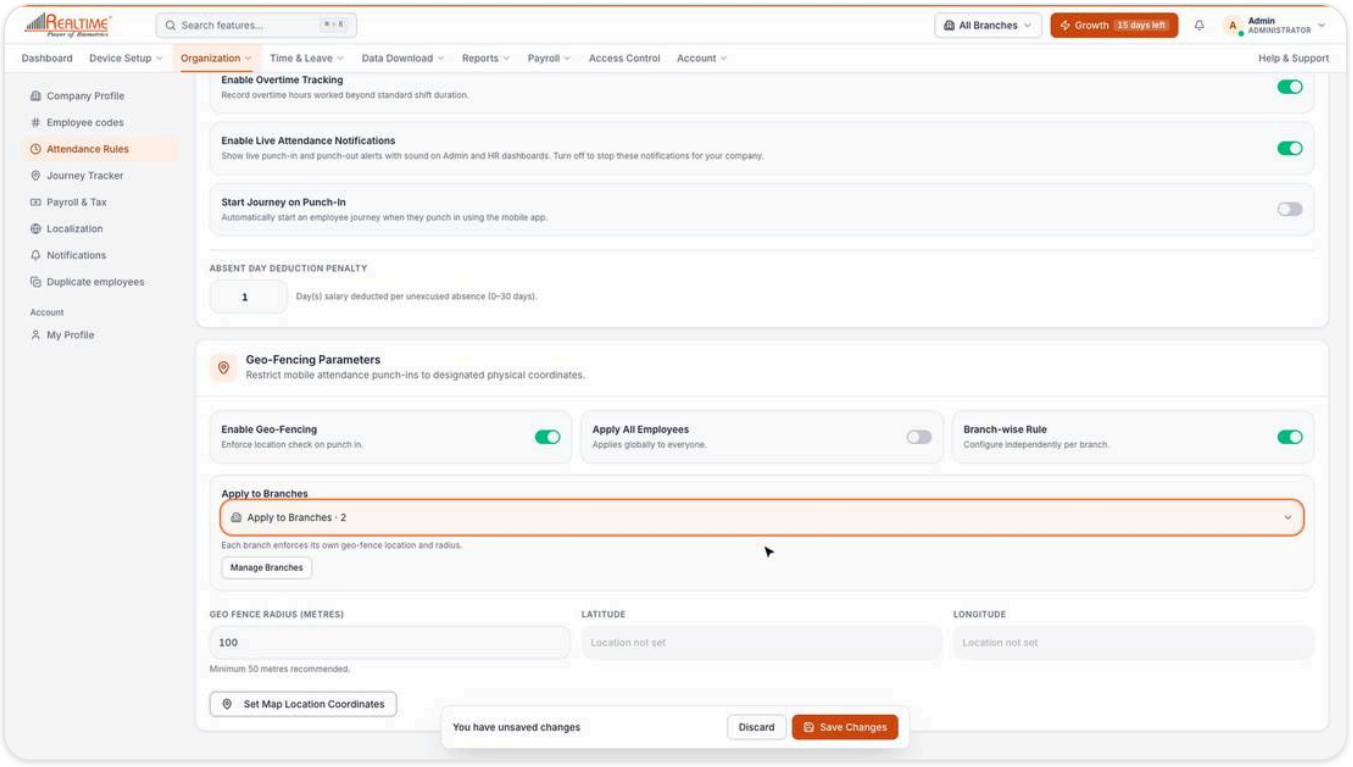
Setting	What it does
Enable Auto Punch-Out	Punches employees out at 11:59 PM if they forget to punch out.

Setting	What it does
Enable Overtime Tracking	Records hours worked beyond the shift, so payroll can pay them. Set how overtime is paid in Shifts, roster and overtime.
Enable Live Attendance Notifications	Shows each punch-in and punch-out as a pop-up with a sound on the Admin and HR dashboards.
Start Journey on Punch-In	Only for the Journey Tracker add-on. See Journey Tracker.
Absent Day Deduction Penalty	Days of salary deducted per unexcused absence, from 0 to 30.

Turn on geo-fencing

Geo-fencing stops staff from punching in on the mobile app unless they are at work.

1. On the same tab, scroll to **Geo-Fencing Parameters**.
2. Switch on **Enable Geo-Fencing**.
3. Choose how it applies:
    - **Branch-wise Rule**: each branch uses its own location and radius. Pick the branches in **Apply to Branches**. This is the best choice if you have more than one location.
    - **Apply All Employees**: one location for everyone. Enter the **Geo Fence Radius (Metres)** and click **Set Map Location Coordinates** to choose the spot.
4. Click **Save Changes**.



> **Note:** For **Branch-wise Rule**, set each branch's pin and radius first under **Organization → Branch**. See Set up your company.

You can also switch geo-fencing off for one employee in their profile, on the **Attendance & devices** step.

Choose your WhatsApp summaries

The **Notifications** tab lets you turn on a **Daily Attendance Summary**, a **Monthly Attendance Summary** and **Device Health Alerts** on WhatsApp. See WhatsApp and integrations.

Create an office time policy

The office time policy sets your grace periods and when a short day becomes a half day or an absence. Your first policy becomes the default for everyone.

1. Click **Organization → Office Time Policy**.
2. Click **Create First Policy** (or **Add New Policy** if you already have one).

3. Enter a **Policy Name**, such as "Standard Office Policy". Leave **Default** on if this policy should apply to everyone without their own.
4. Under **Grace periods & working hours**, set the times in hours and minutes:

Setting	What it does
Permitted Late Arrival	How late staff can arrive without being marked late, for example 15 minutes.
Permitted Early Departure	How early staff can leave without being marked early, for example 10 minutes.
Half-day threshold	Below these working hours, the day is a half day (for example 7 hours).
Absent threshold	Below these working hours, the day is marked absent (for example 4 hours). Keep it lower than the half-day threshold.

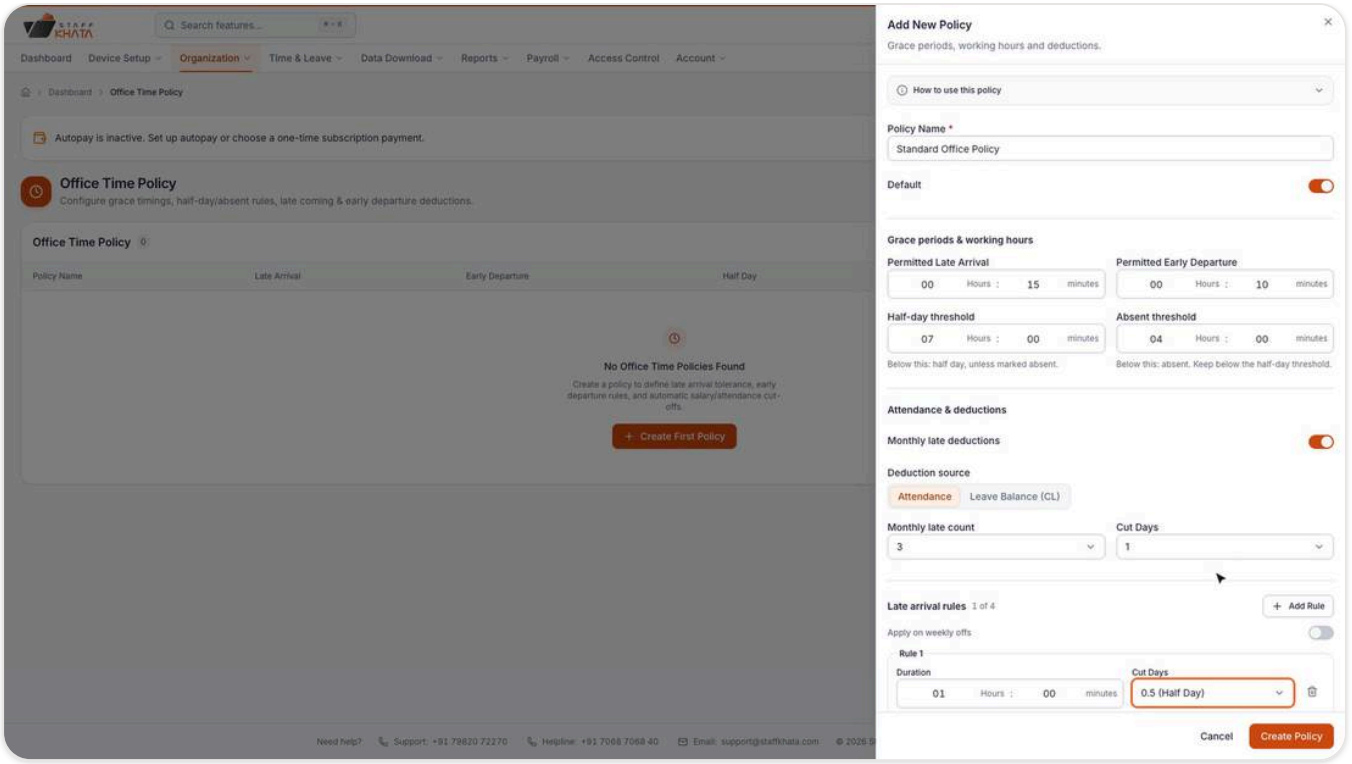
Monthly late deductions

Use this to turn repeated lateness into a cut.

1. Switch on **Monthly late deductions**.
2. Choose the **Deduction source**: **Attendance** (cuts attendance days) or **Leave Balance (CL)** (cuts casual leave).
3. Set **Monthly late count** and **Cut Days**. For example, 3 and 1 means every 3 late arrivals in a month cost one day.

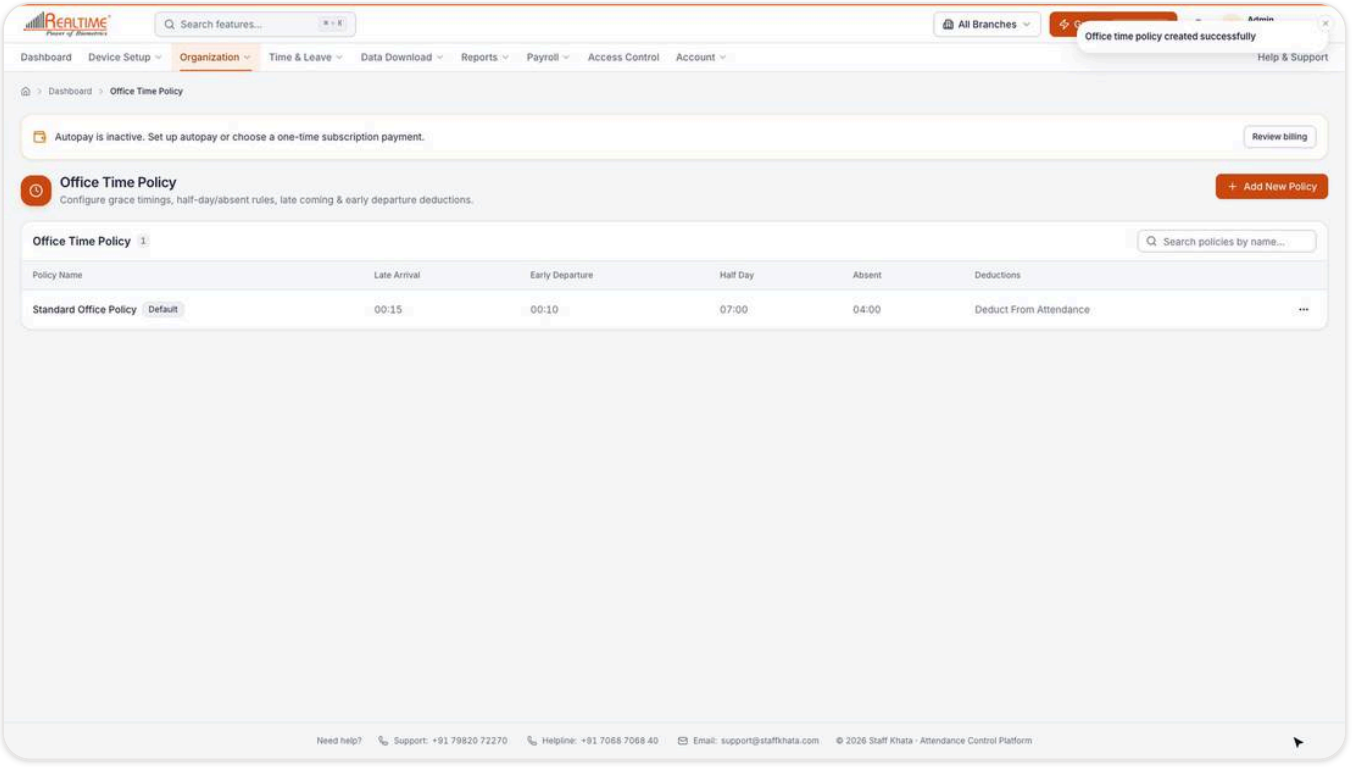
Very late and early departure rules

Under **Late arrival rules**, click **Add rule**, enter a **Duration** and choose the **Cut Days**. For example, more than 1 hour late cuts **0.5 (Half Day)**. You can add up to 4 rules. **Early departure rules** work the same way for staff who leave early. Switch on **Apply on weekly offs** if the rules should also count on weekly off days.



5. Click **Create Policy**.

The policy appears in the list with its late, early, half-day and absent times. To change which policy is the default, open a policy's row menu (⋯) and click **Make Default**.



Tip: Need different timings for some staff, such as a factory floor? Create a second policy

> and choose it in the **Office Time Policy** field when you add or edit those employees.

Next, add your employees.

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Add and manage employees

Plan: All plans

There are three ways to add employees: one at a time with the **Add Employee** form, many at once from an Excel file, or by sending an invite so they fill in their own details.

Open the employee list

Click **Organization** → **Employee List**. The **Employee Directory** shows everyone with their code, department, contact details and status. Use **Add Employee**, or the arrow next to it (**More ways to add**), for the other two ways.

Add one employee

The **Add employee** form has four steps. Fields marked with a star are required; you can fill in the rest later.

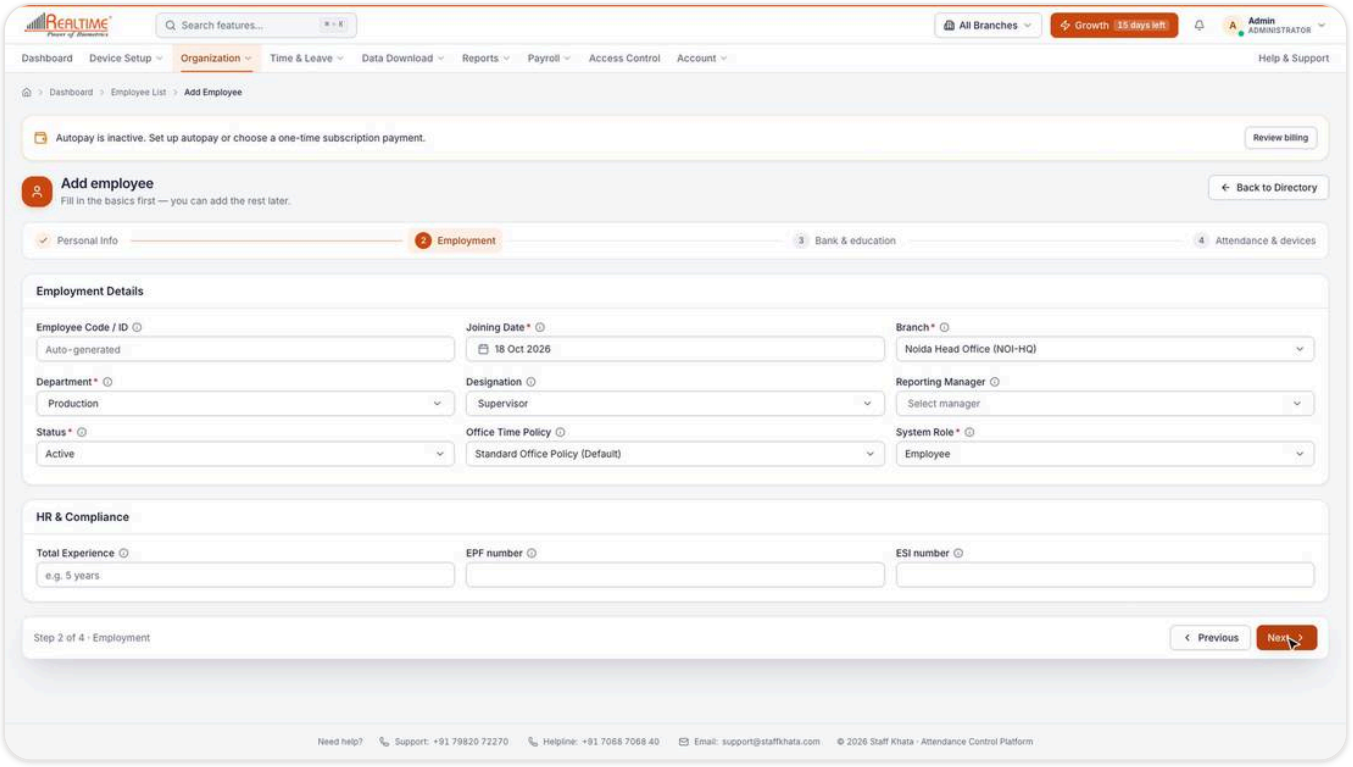
Step 1: Personal Info

1. Enter **First Name**, **Last Name** and **Work Email**.
2. Enter the **Contact Number** with country code. It cannot be changed after the employee is added.
3. Set a first **Password**. The employee can change it after signing in.
4. Choose **Gender**, then click **Next**.

Step 2: Employment

1. Leave **Employee Code / ID** blank to create a code from your company format. See Set up your company.
2. Check the **Joining Date**, then choose **Branch**, **Department** and **Designation**.
3. Choose the **System Role**. Most staff are **Employee**; they see only their own data.
4. **Office Time Policy** uses your default policy unless you pick another.

5. **Reporting Manager**, **EPF number** and **ESI number** are optional. Click **Next**.



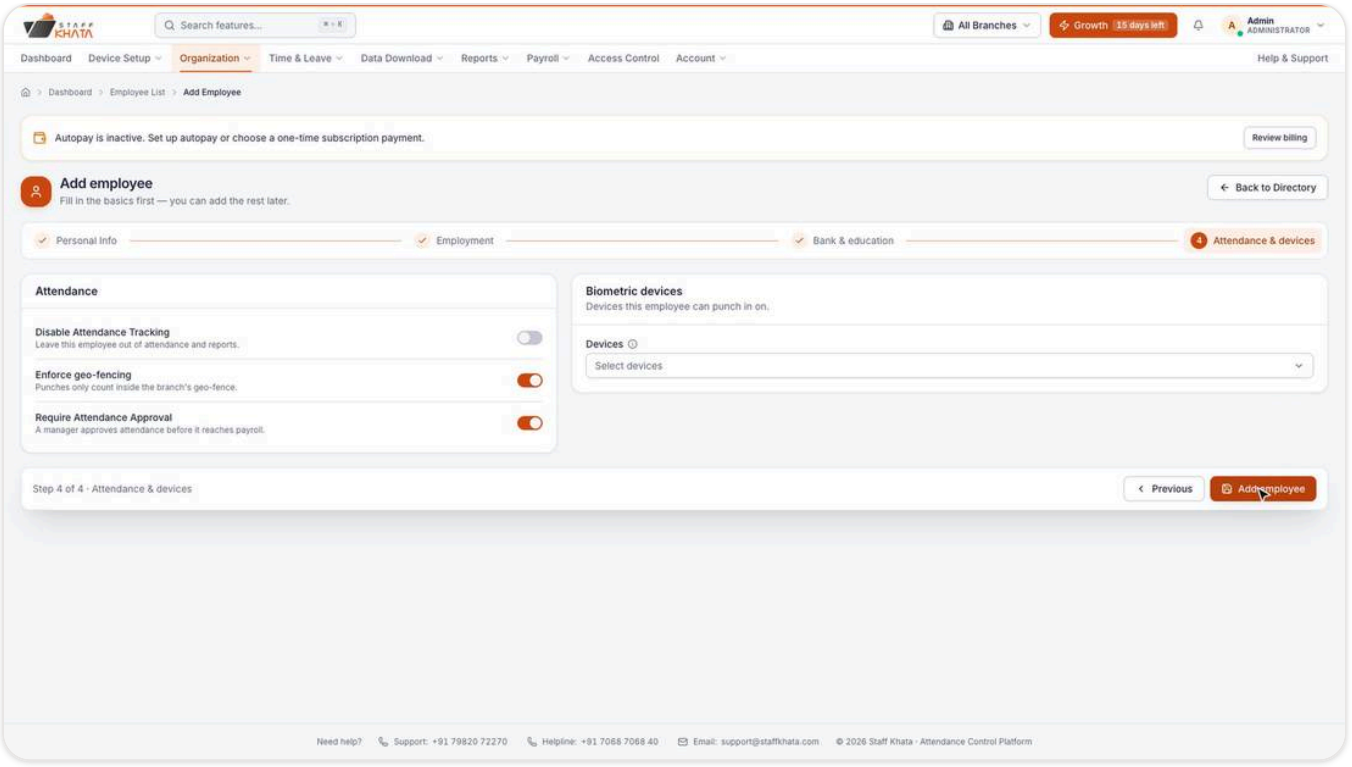
Step 3: Bank & education

Bank details are used for salary payouts. Both sections are optional. Click **Next**.

Step 4: Attendance & devices

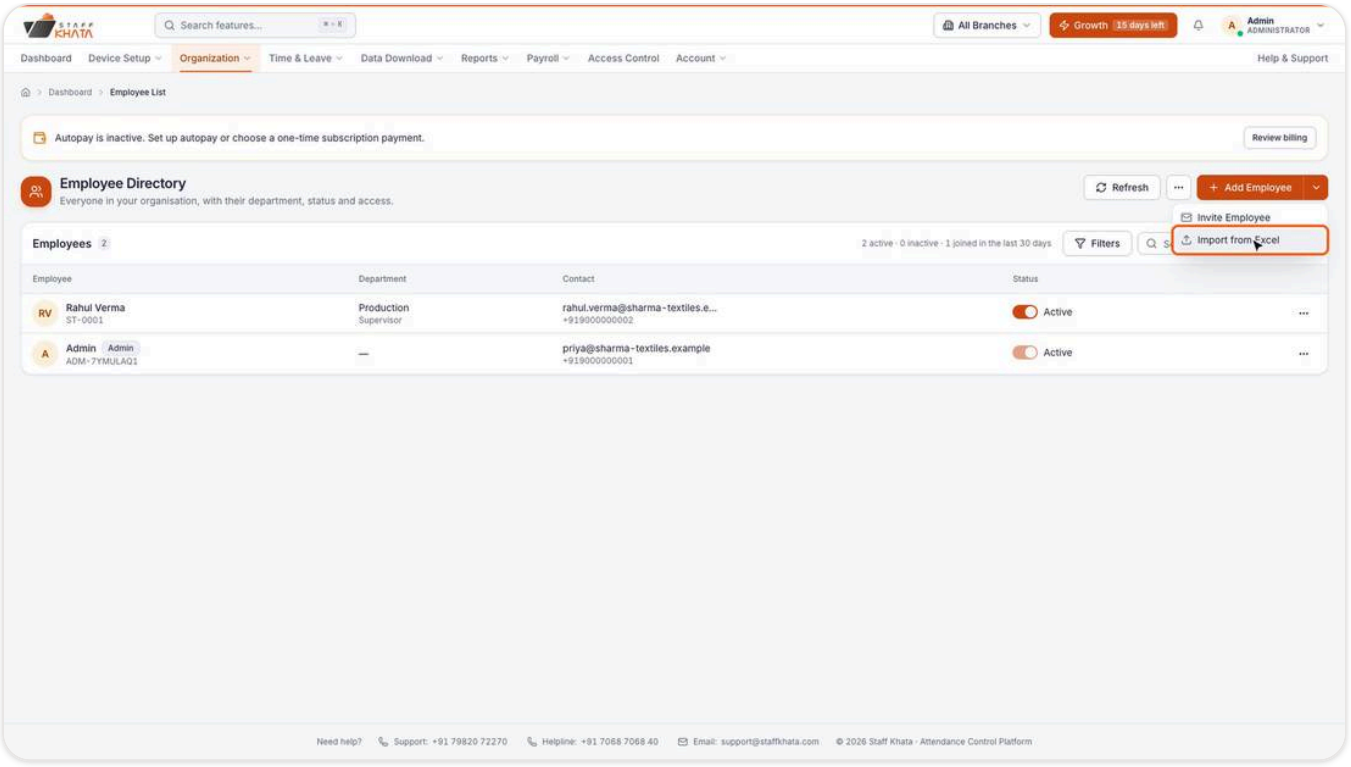
Setting	What it does
Disable Attendance Tracking	Leaves this employee out of attendance and reports.
Enforce geo-fencing	Punches only count inside their branch's geo-fence.
Require Attendance Approval	A manager approves attendance before it reaches payroll.
Devices	The biometric devices this employee can punch in on.

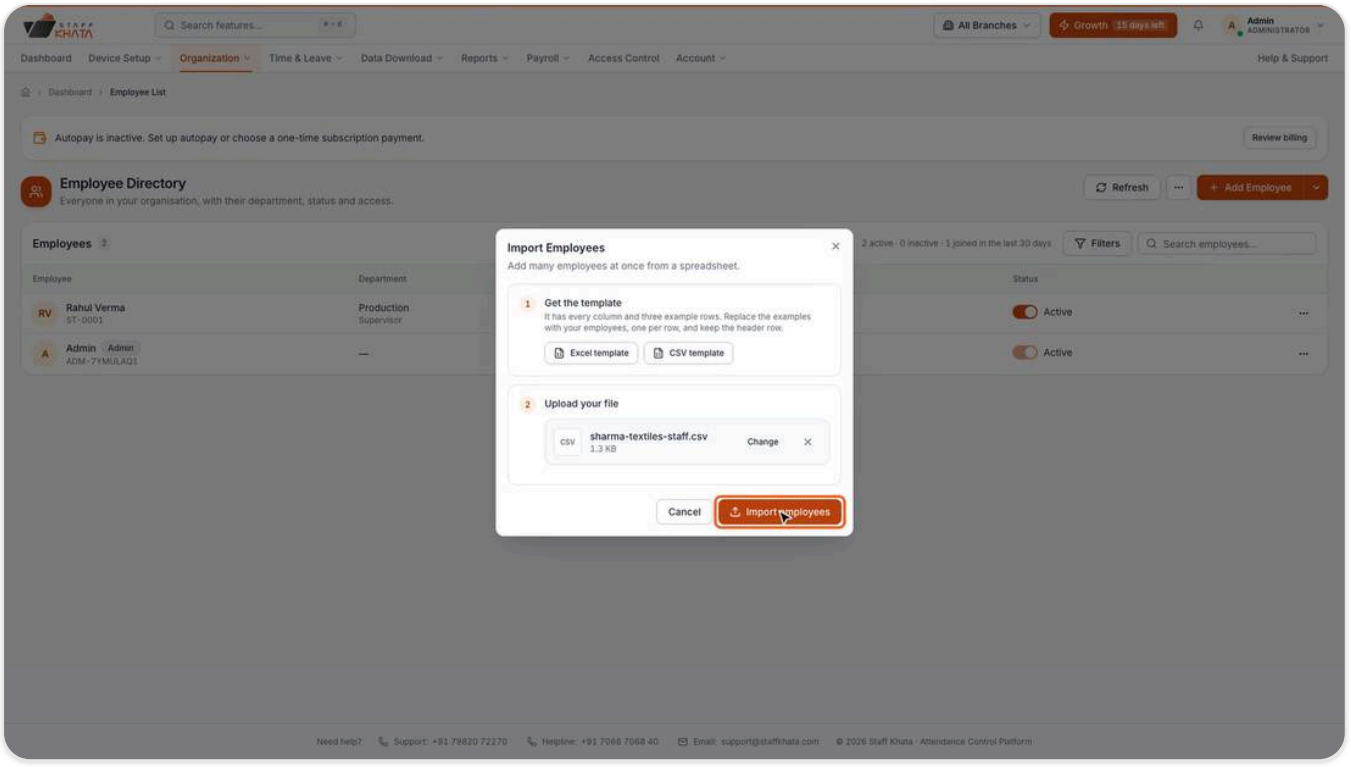
Click **Add employee**. The new employee appears in the list with their own code.



Import employees from Excel

1. Click the arrow next to **Add Employee** and choose **Import from Excel**.
2. Under **Get the template**, click **Excel template** (or **CSV template**). It has every column and three example rows.
3. Replace the examples with your employees, one per row. Keep the header row.
4. Under **Upload your file**, drop the file or click **browse**. Excel or CSV, up to 2 MB.
5. Click **Import employees**.





Rows left without an employee code get one from your code format. If some rows fail, Staff Khata lists them under **Rows that need fixing**. Fix them in the downloaded file and import that file again.

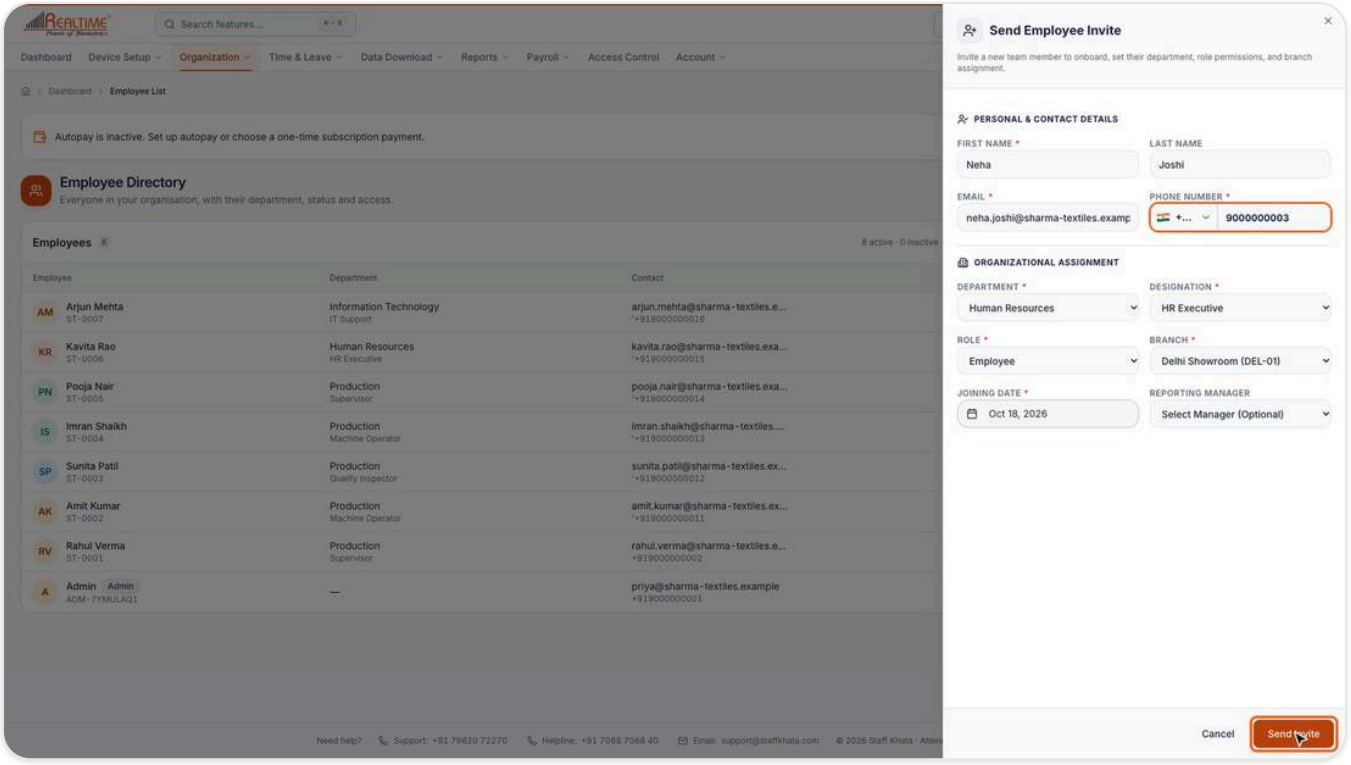
> **Tip:** The template has no password column. Add a column named `password` to set each employee's first password. Without it, a standard default password is set, so ask staff to

> change it after they sign in.

Invite employees to fill in their own details

The employee adds their own date of birth, address, emergency contact and bank details.

1. Click the arrow next to **Add Employee** and choose **Invite Employee**.
2. Fill in **First Name**, **Last Name**, **Email** and **Phone Number**.
3. Choose **Department**, **Designation**, **Role**, **Branch** and **Joining Date**. **Reporting Manager** is optional.
4. Click **Send Invite**.

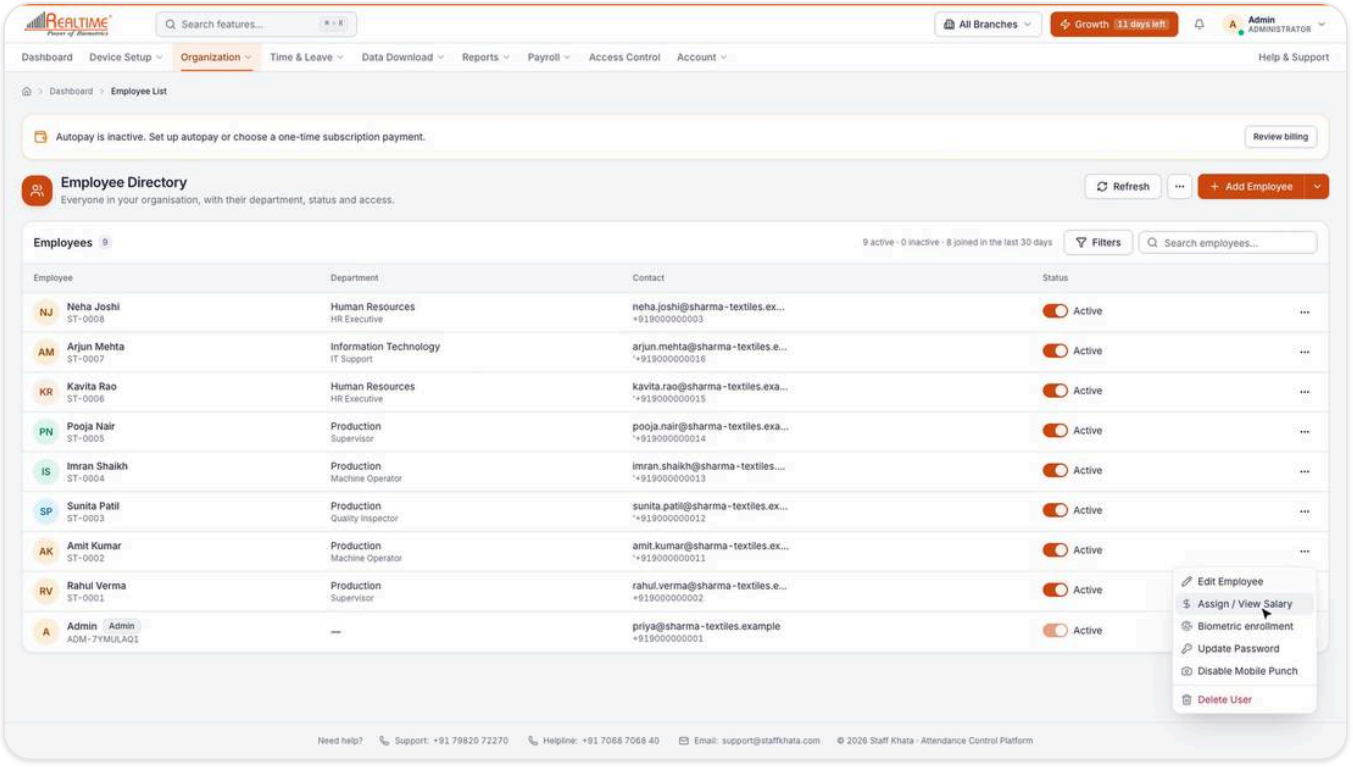


The employee gets a link by email and on WhatsApp. They open it, verify themselves with the one-time code, fill in their details, set a password and click **Complete onboarding**. The link works for 7 days.

Manage an employee

Open the row menu (⋯) on any employee to:

- **Edit Employee**: change their details.
- **Assign / View Salary**: set their salary structure. See Payroll and salaries.
- **Biometric enrollment**: enrol their fingerprint or card on a Realtime biometric device. See Biometric devices.
- **Update Password**: set a new password for them.
- **Disable Mobile Punch** / **Enable Mobile Punch**: control whether they can punch in from the Staff Khata mobile app with a selfie and their location. Mobile punch is on for new employees; turn it off for staff who should punch only on a biometric device.



Use the **Status** switch in the list to make an employee inactive. Inactive employees cannot sign in and are hidden from attendance.

> **Plan needed:** Employee login on the web and mobile app, including mobile punch and self-onboarding, may need a higher plan. Every new company gets a 15-day trial with everything unlocked. See **Billing & Plan** for current plans.

Next, set up shifts, roster and overtime.

06

Shifts, roster and overtime

Plan: All plans

A shift sets your staff's working hours, grace time and weekly offs. The roster says who works which shift on which day, and overtime rules decide how extra hours are paid.

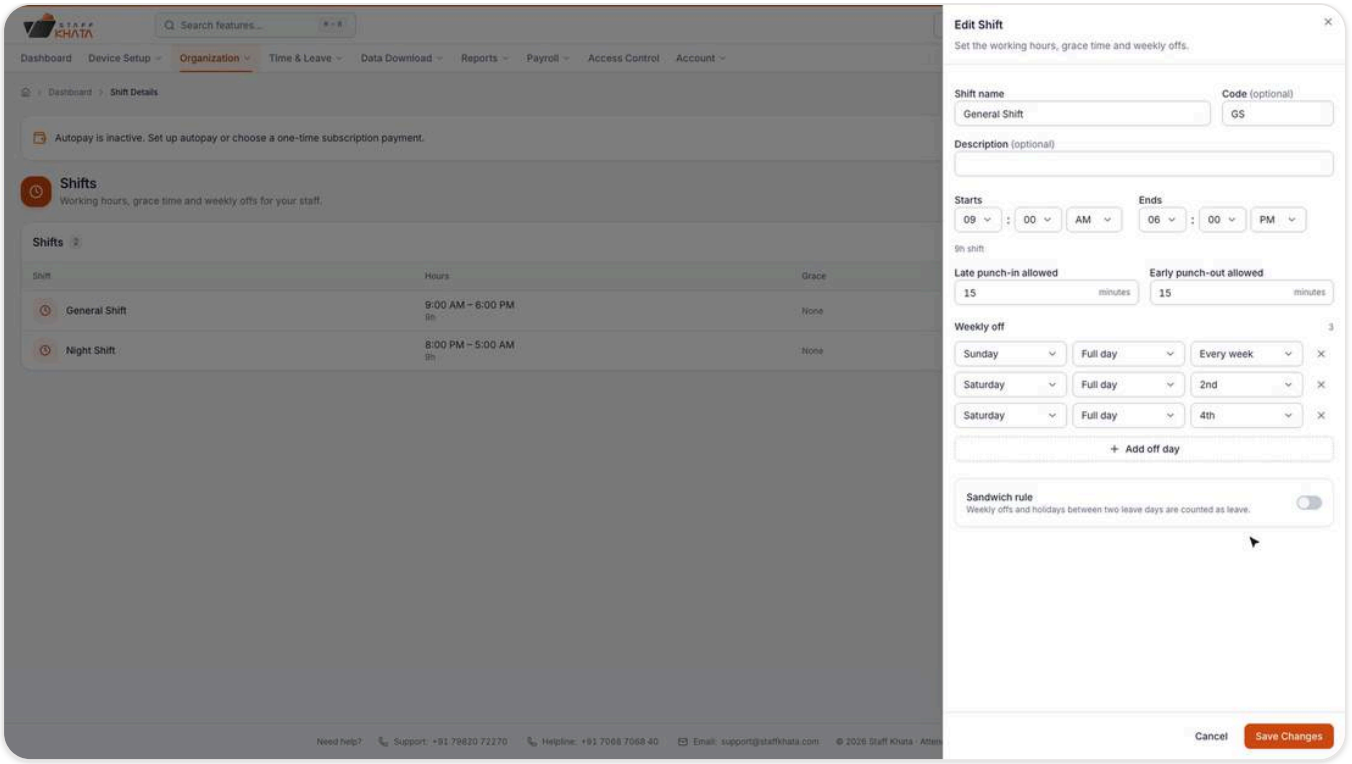
Set up a shift

Your workspace starts with a **General Shift** and a **Night Shift**. Edit them to match your hours, or click **Add shift** to create a new one.

1. Click **Organization** → **Shift Details**.
2. Open a shift's row menu (⋯) and click **Edit**.
3. Check the **Shift name**, and add a short **Code** (for example `GS`).
4. Set **Starts** and **Ends**. A night shift that ends after midnight is marked "ends the next day".
5. Set **Late punch-in allowed** and **Early punch-out allowed** in minutes. For example, 15 minutes each.

Add weekly offs

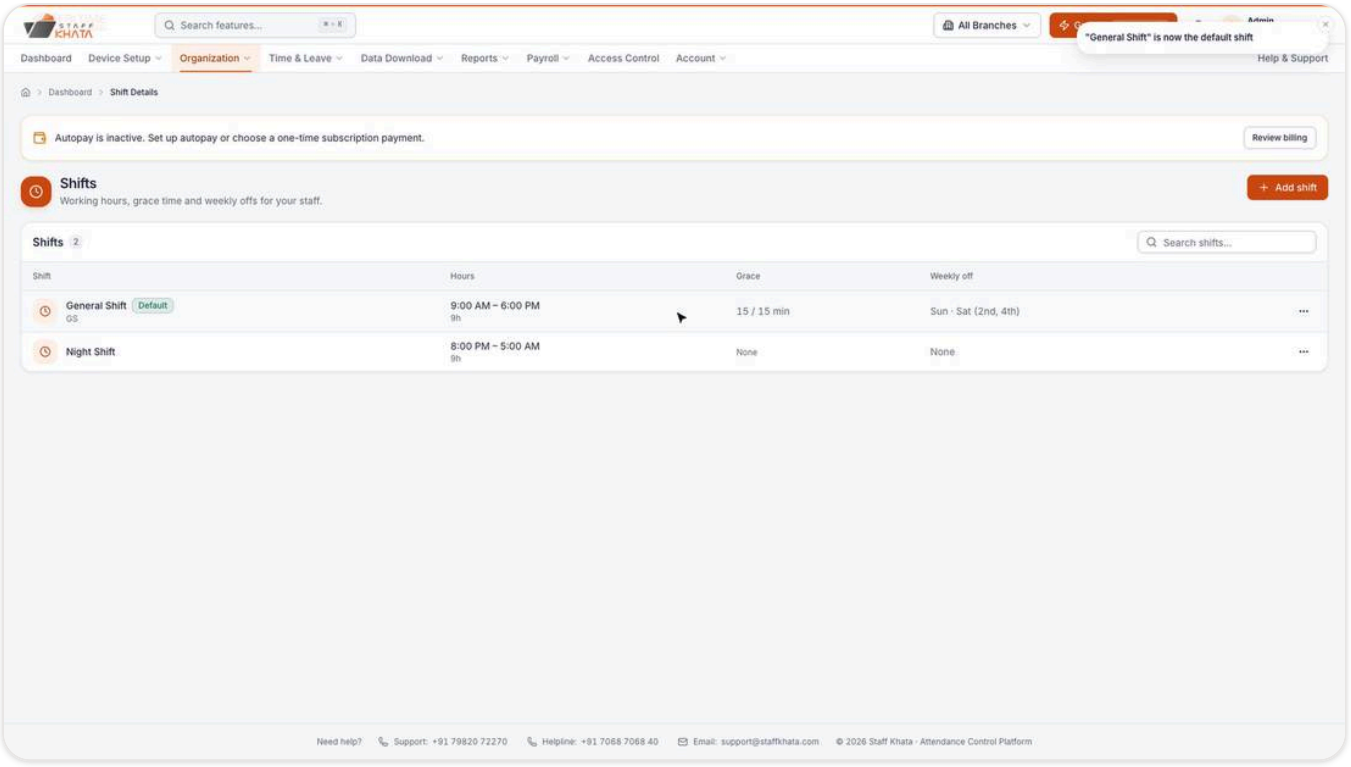
1. Under **Weekly off**, click **Add off day**.
2. Choose the **Day**, the **Type** (**Full day** or **Half day**) and **Which weeks**: **Every week**, or the 1st, 2nd, 3rd, 4th or last week of the month.
3. Repeat for each off day. For example, Sunday every week plus Saturday in the 2nd and 4th weeks gives staff two Saturdays off a month.
4. Click **Save Changes**.



Setting	What it does
Late punch-in allowed	Minutes staff can arrive late on this shift without a late mark.
Early punch-out allowed	Minutes staff can leave early without an early mark.
Weekly off	Days off for this shift. Half days still count as working days.
Sandwich rule	Weekly offs and holidays between two leave days are counted as leave.

Make it the default shift

Open the shift's row menu and click **Make default**. Every new employee then starts on this shift. The list shows the default shift with a **Default** badge, its hours, grace and weekly offs.

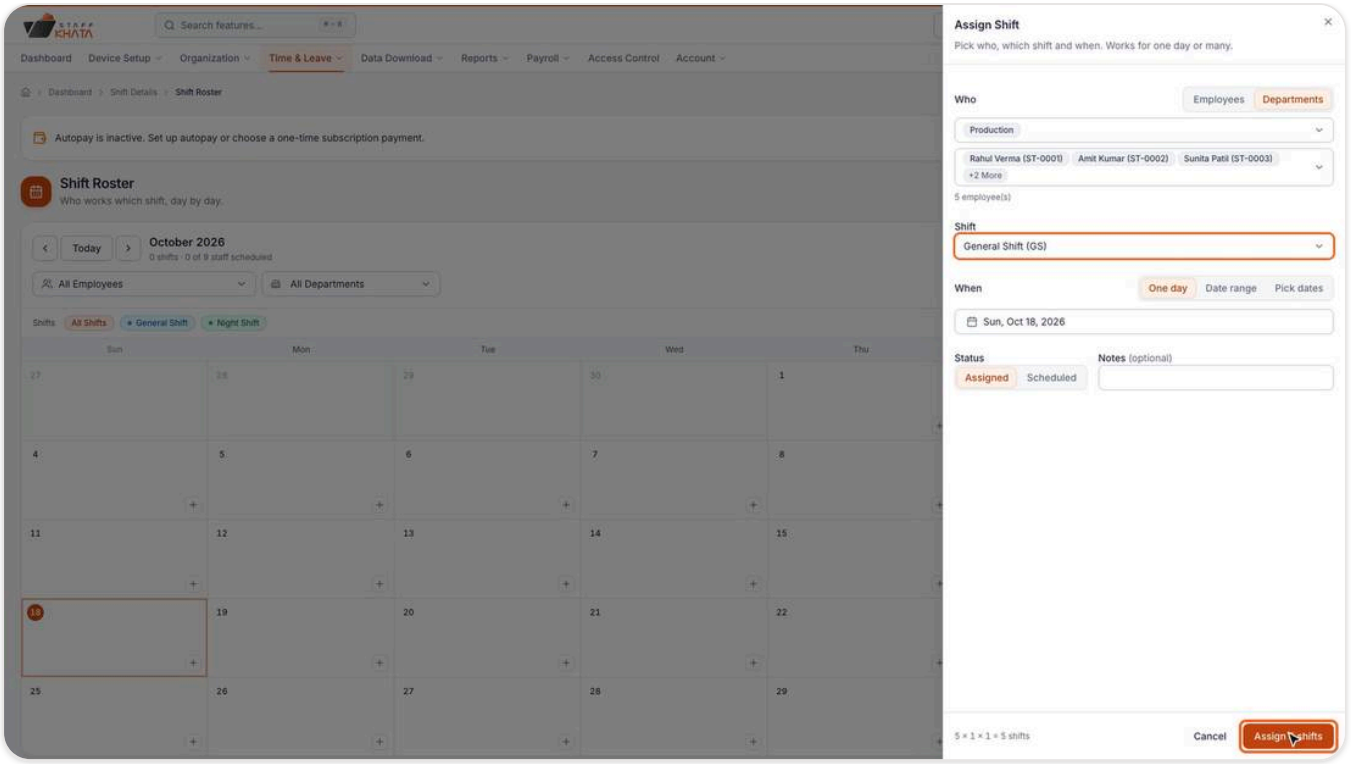


> **Plan needed:** Lower plans allow one shift. You can still edit and assign it. To create more shifts, you may need a higher plan; see **Billing & Plan**.

Assign shifts with the roster

The **Shift Roster** is a calendar of who works which shift, day by day.

1. Click **Time & Leave** → **Shift Roster**. Switch between **Calendar**, **Week** and **Month table** views, and filter by employee, department or shift.
2. Click **Assign Shift**.
3. Under **Who**, pick **Employees** one by one, or **Departments** to take a whole team.
4. Choose the **Shift**.
5. Under **When**, choose **One day**, **Date range** or **Pick dates**, and set the date.
6. Click **Assign Shifts**.

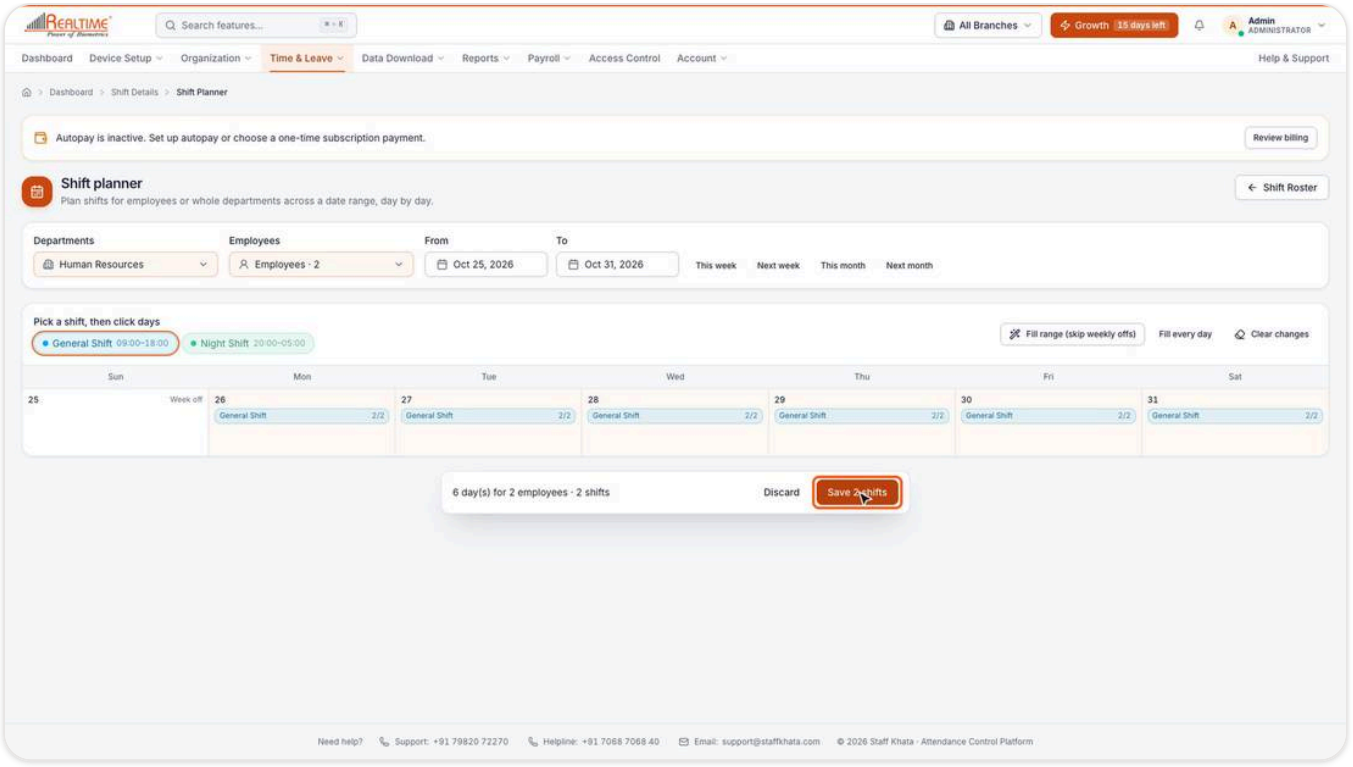


A shift you assign applies from that date onwards, until you assign a different one. **Time & Leave → Shift Assignment** opens the same panel directly.

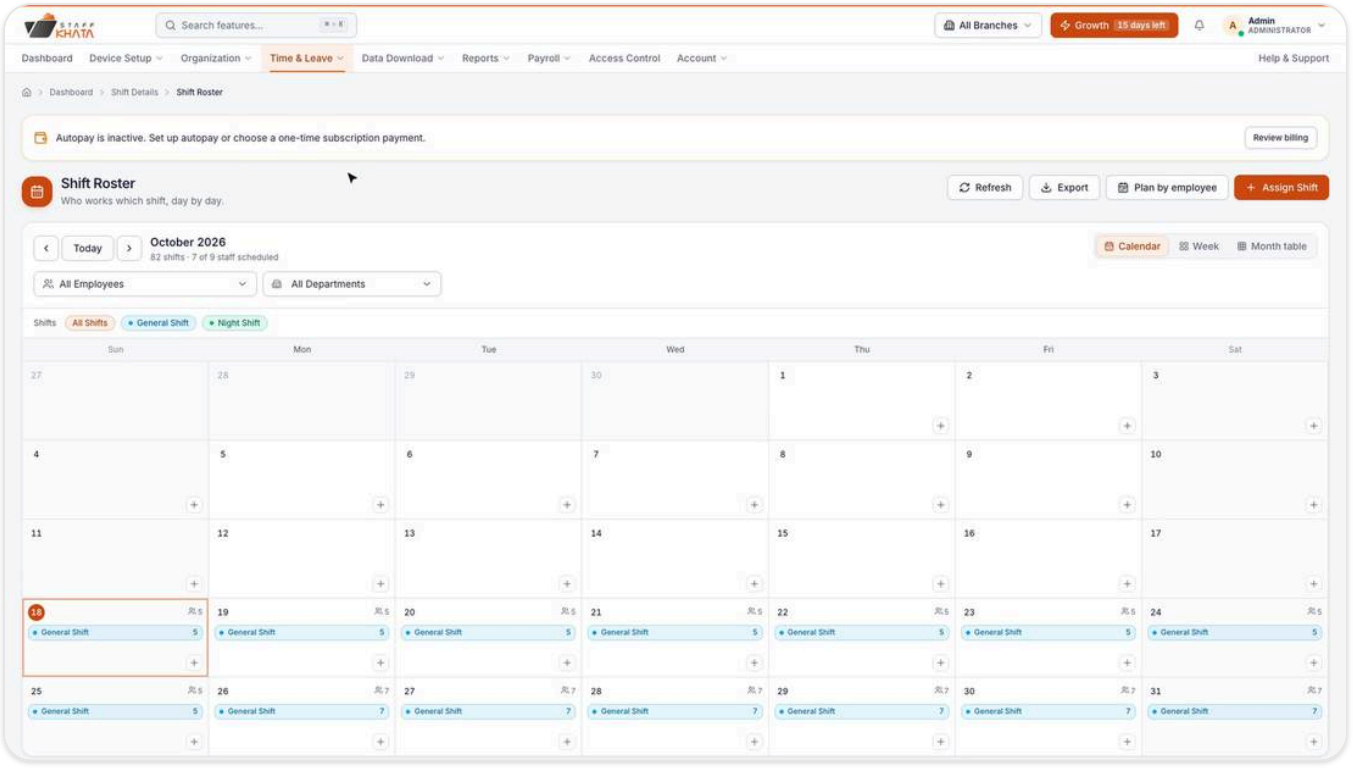
Plan ahead with the shift planner

The planner is quicker for filling a week or a month for many people at once.

1. Click **Time & Leave → Shift Planner**.
2. Pick **Departments** or **Employees**, then a **From** and **To** date, or click **This week**, **Next week**, **This month** or **Next month**.
3. Click a shift under **Pick a shift, then click days**.
4. Click individual days, or click **Fill range (skip weekly offs)** to fill every working day at once. **Fill every day** includes weekly offs.
5. Click **Save** in the bar at the bottom.



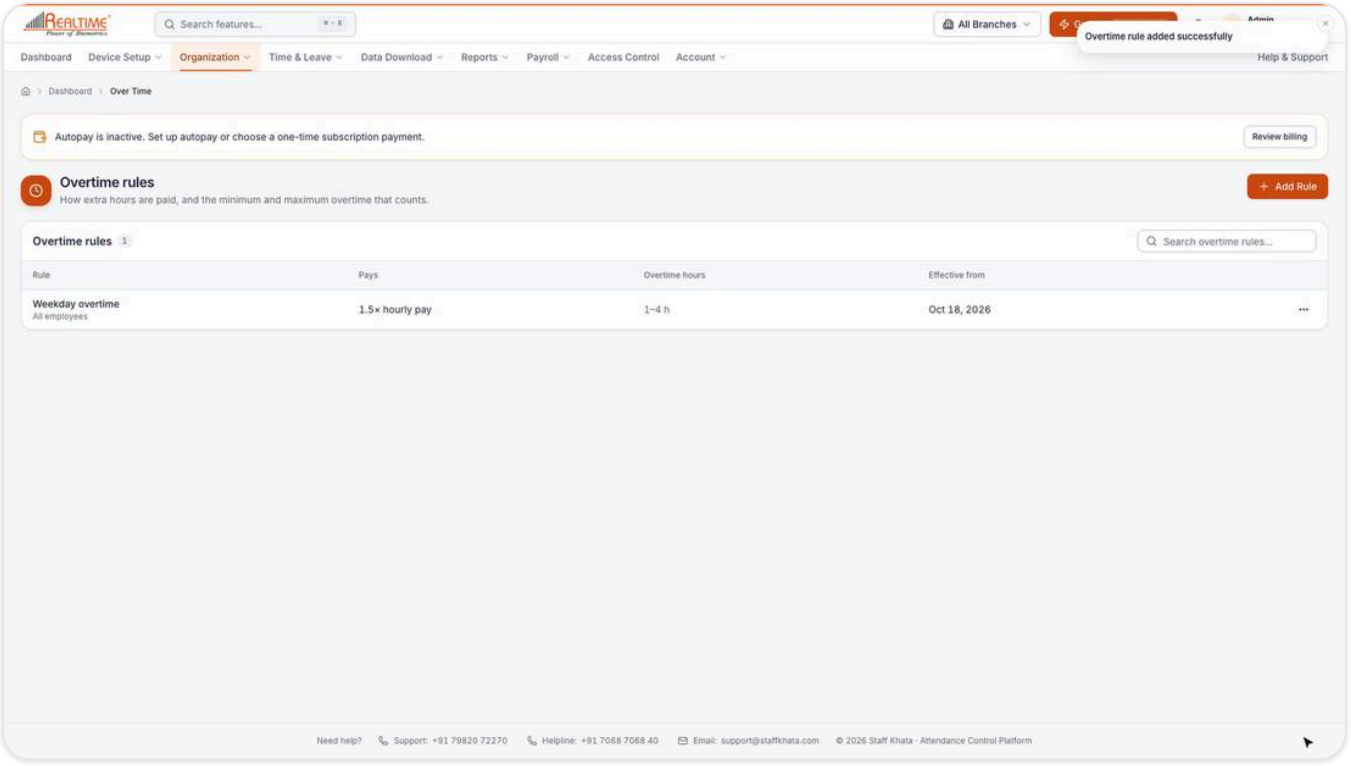
Back on the roster, every planned day now shows its shift.



Set overtime rules

Overtime rules decide how extra hours are paid in payroll. Turn on **Enable Overtime Tracking** first; see Attendance rules.

1. Click **Organization** → **Over Time**, then click **Add Rule**.
2. Enter a **Rule name**, such as "Weekday overtime".
3. Under **Applies to**, choose **All employees** or **Some departments**.
4. Under **Pay as**, choose how each overtime hour is paid and enter the rate:
    - **Multiple of pay**: for example 1.5 × hourly pay.
    - **Percent of pay**: for example 150% of hourly pay.
    - **Fixed amount**: the same amount per hour for everyone.
5. Set **Minimum overtime (h)** and **Maximum overtime (h)**. Only extra hours in this band count, for example 1 to 4 hours.
6. Set **Effective from**, then click **Add Rule**.



> **Plan needed:** Overtime may need a higher plan. See **Billing & Plan**.

Next, see how employees punch in on the mobile app.

07

Mobile app: punching in

Plan: Plans with employee login

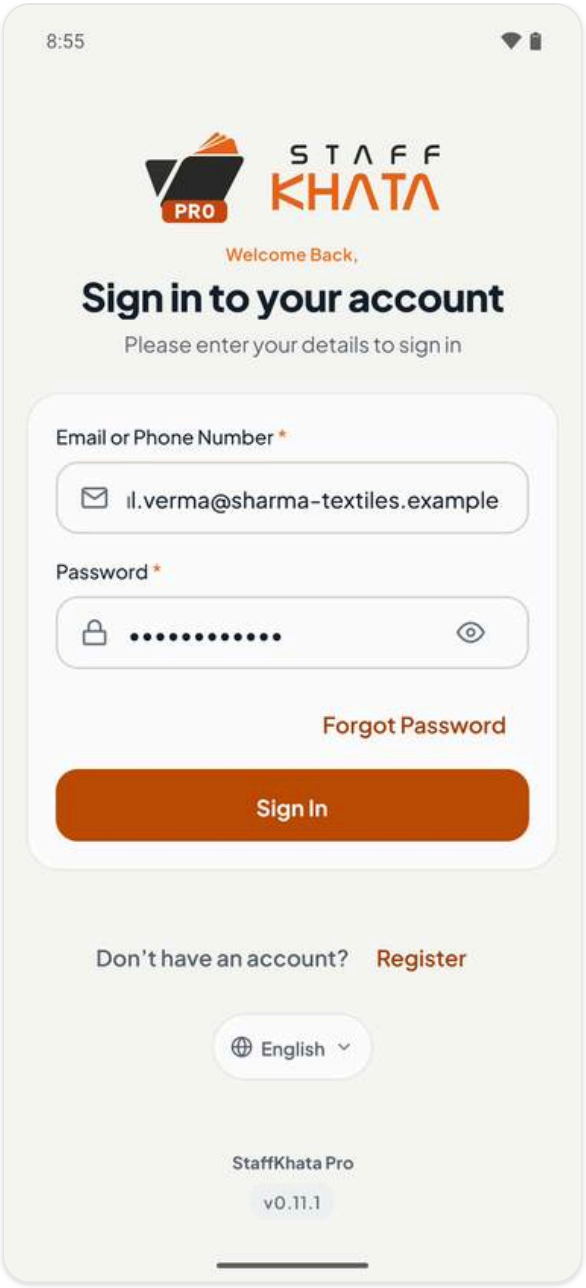
With the Staff Khata app, employees mark attendance from their own phone. Each punch saves the time, the phone's location and a selfie, and your branch geo-fence decides where punching is allowed.

> **Plan needed:** Employee login on web and mobile can be locked on lower plans. If your staff cannot sign in, see **Billing & Plan** for current prices and plans.

For employees: install the app and sign in

Your admin creates your login. You need the email (or phone number) and password they set for you.

1. Install **Staff Khata** from the Google Play Store (Android) or the App Store (iPhone).
2. Open the app. On **Sign in to your account**, enter your **Email or Phone Number** and **Password**.
3. Tap **Sign In**. The **Today** screen opens.



You only ever see your own attendance. The tabs at the bottom are **Today**, **Attendance**, **Leave** and **Company**.

> **Tip:** Forgot your password? Tap **Forgot Password?** on the sign-in screen, or ask your admin to reset it.

Allow camera and location

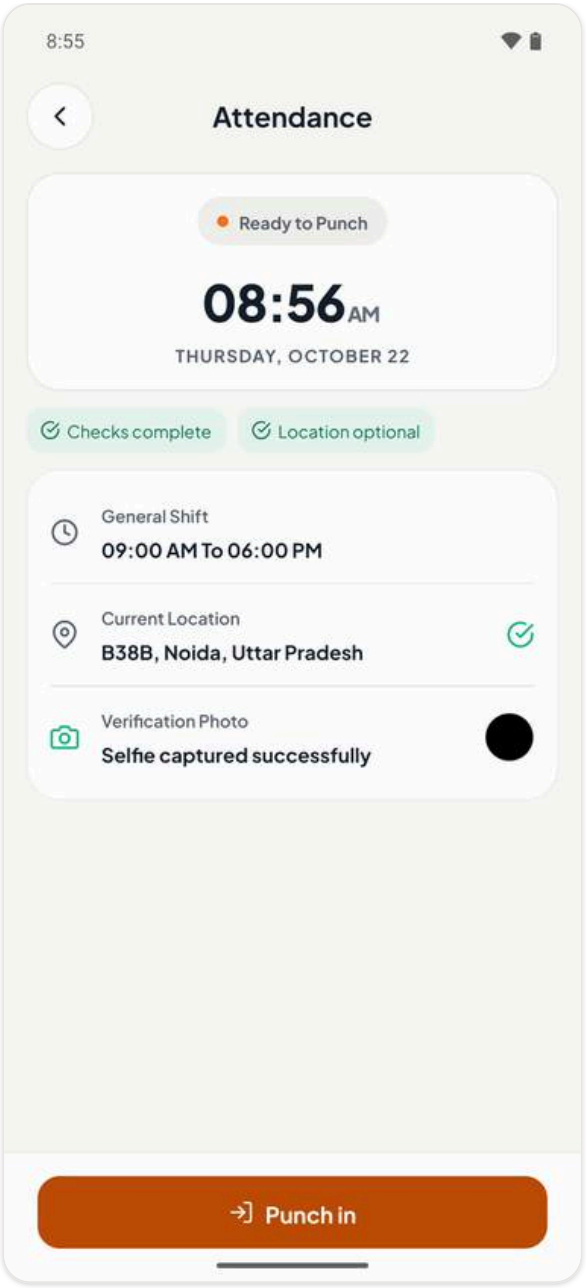
The app needs your location to check you are at work, and the camera for the punch selfie.

1. The first time you punch, your phone asks for location access. Tap **Allow** (choose "While using the app").
2. When the camera opens, allow camera access too.

If you said no by mistake, the app shows **Location required** or **Camera access required**. Tap **Enable Camera**, or open your phone's **Settings → Apps → Staff Khata → Permissions** and turn them on.

Mark attendance with a selfie and GPS

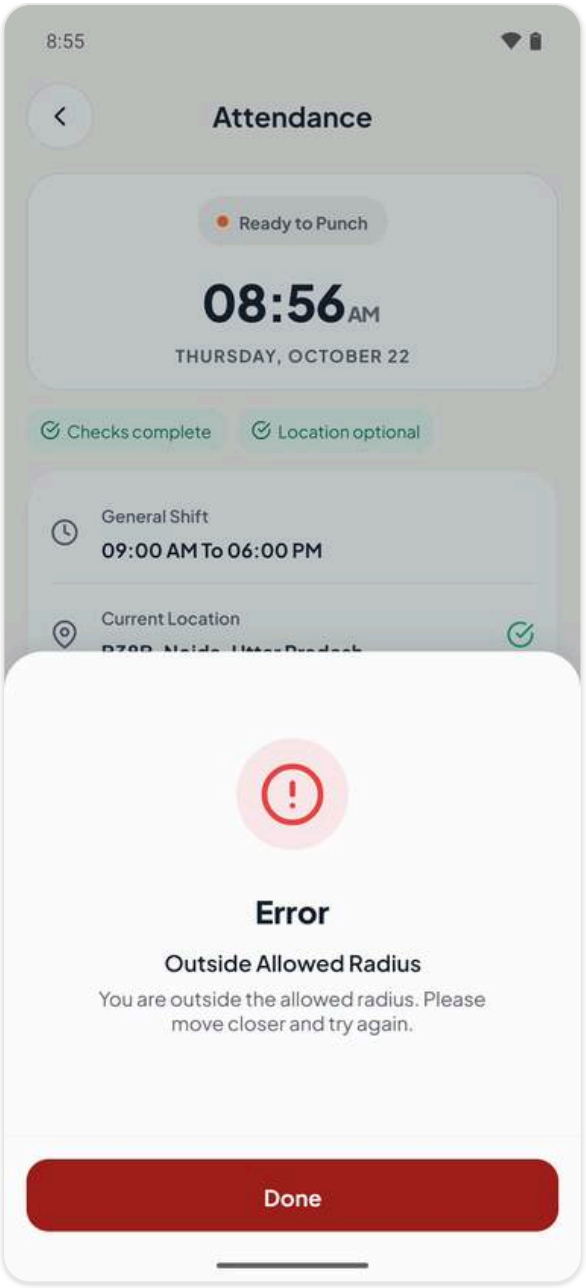
1. On **Today**, tap **Punch in**. (You can also open the **Attendance** tab and tap **Mark Attendance**.)
2. The **Attendance** screen shows your **Assigned Shift** and your **Current Location**. If the address looks wrong, tap **Tap to refresh location**.
3. Tap **Tap to take a selfie** and take a clear photo of your face. It appears under **Verification Photo**.
4. Tap **Punch in**.



You see **Punched In Successfully!** with the time. Your admin sees the punch on their dashboard within seconds.

What happens outside the geo-fence

If your branch has geo-fencing on, you can only punch within its radius, for example 200 metres around the office. Outside it, the punch is blocked with **Outside Allowed Radius**: "You are outside the allowed punch-in radius. Please move closer and try again."

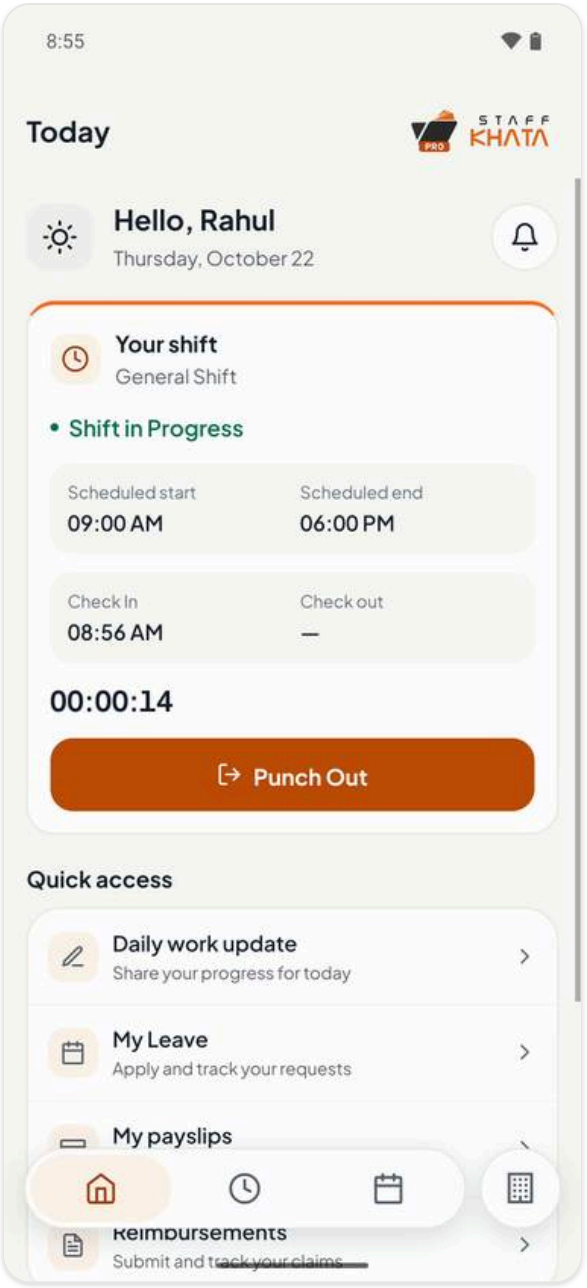


Walk into the office, tap **Tap to refresh location**, and punch again. Admins set the radius per branch. See Set up your company, branches and departments.

Punch out

1. At the end of the day, tap **Punch out** on **Today**.
2. Take another selfie and tap **Punch out**.

You see **Punched Out Successfully!**. Staff Khata works out your hours against your shift, so late marks, early exits and overtime are calculated for you.



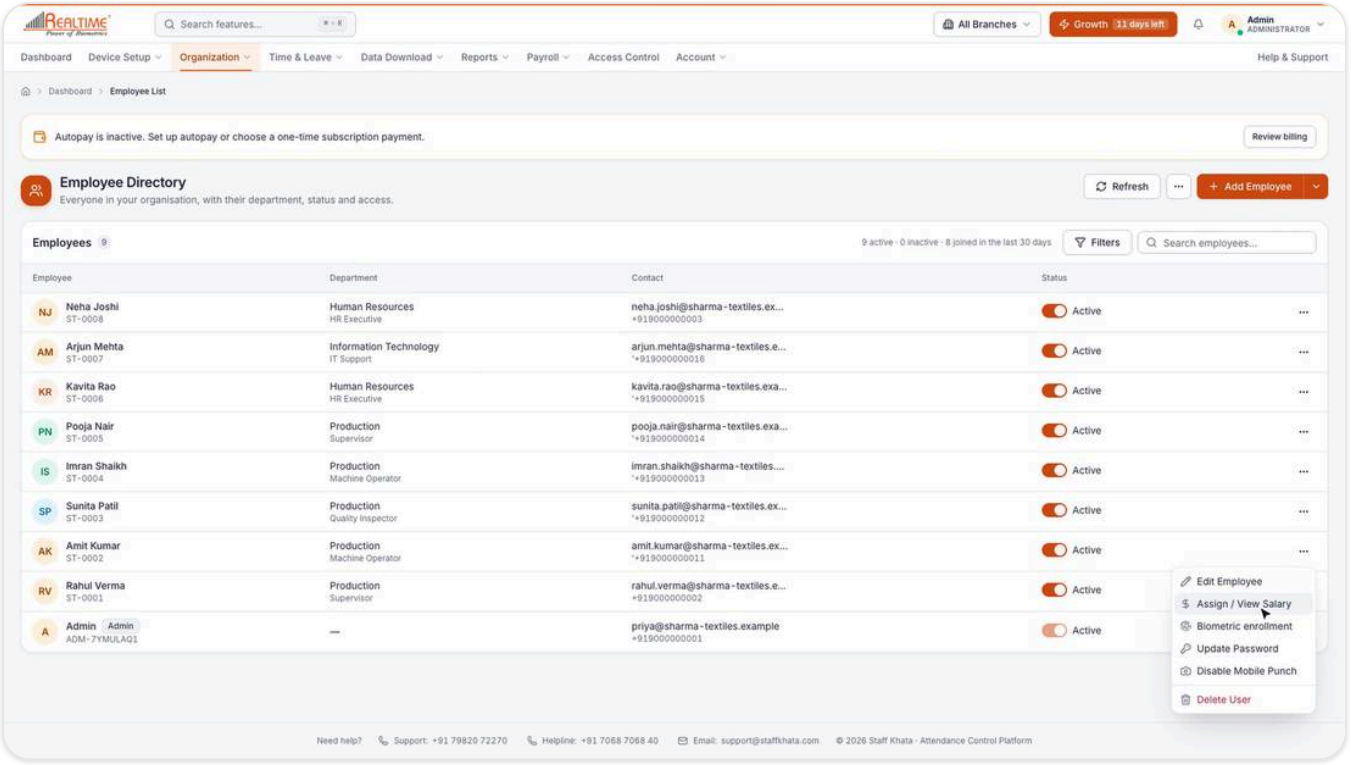
View your attendance history

1. Open the **Attendance** tab. Switch between **Day** and **Month**, and use the arrows to move between periods.
2. Tap a day to see its **Punched In At** and **Punched Out At** times, the location and the photos.
3. Punch wrong or missing? On that day, tap **Request Regularisation**, enter the correct times and a reason, then tap **Submit Request**. Your admin approves it on the web.

For admins: turn mobile punch on or off per employee

Mobile punch is on for new employees by default. Turn it off for staff who should only punch at a biometric machine.

1. Click **Organization → Employee List**.
2. Click the ⋯ menu on the employee's row.
3. Click **Disable Mobile Punch** (or **Enable Mobile Punch** to switch it back on).



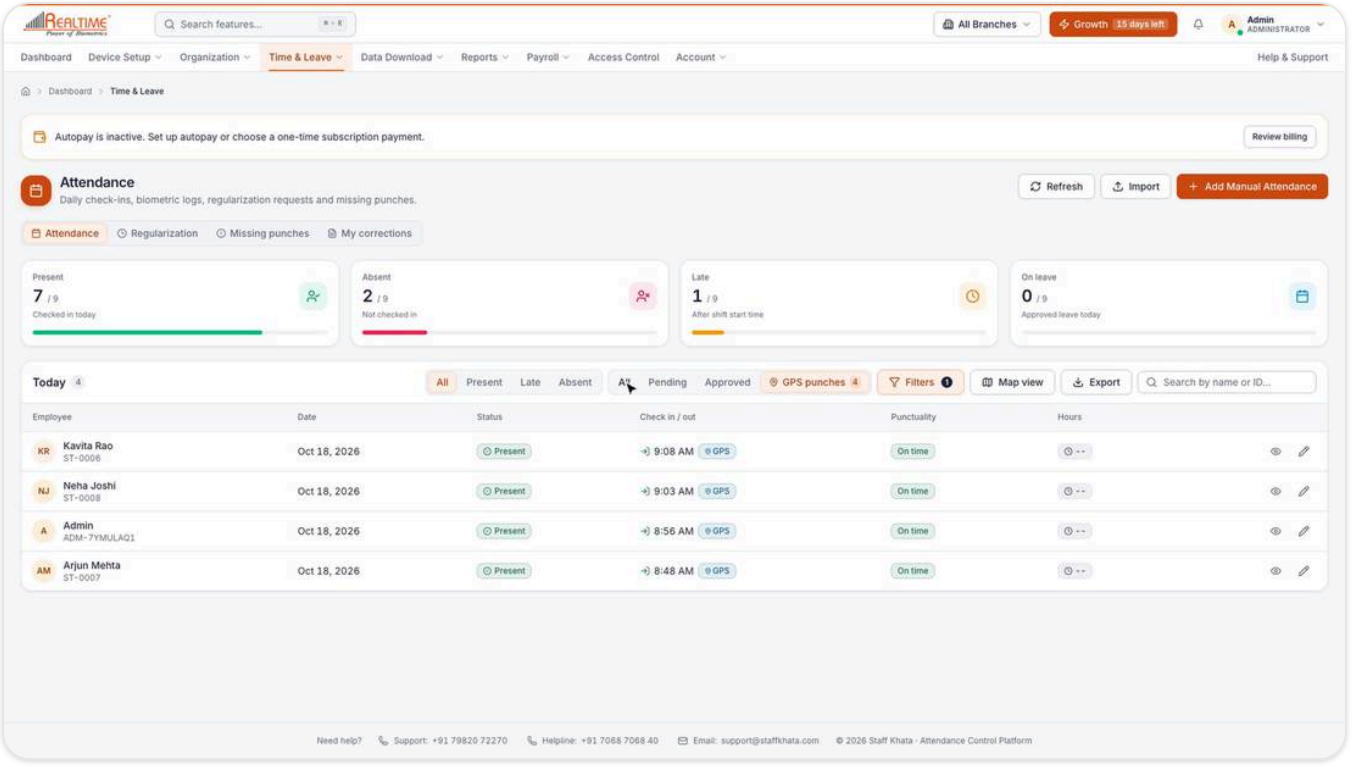
When it is off, the app tells the employee "Mobile punching disabled" and to use their assigned machine. To set or reset an employee's password, use **Update Password** in the same menu.

For admins: see where punches came from

Every mobile punch appears in **Recent Punches** and on the map on your dashboard. For the full list:

1. Click **Time & Leave → Attendance Process**.
2. Click **GPS punches**. Only punches made from the app are shown, each marked **GPS**.

3. Click the eye icon on a row to see the check-in and check-out location on a map and the punch photo. Click **Map view** to see all of today's mobile punches on one map.



08

Connect a Realtime biometric machine

Plan: All plans

Staff who punch at the door can use a Realtime biometric machine. Once it is connected, every fingerprint or card punch reaches Staff Khata within seconds.

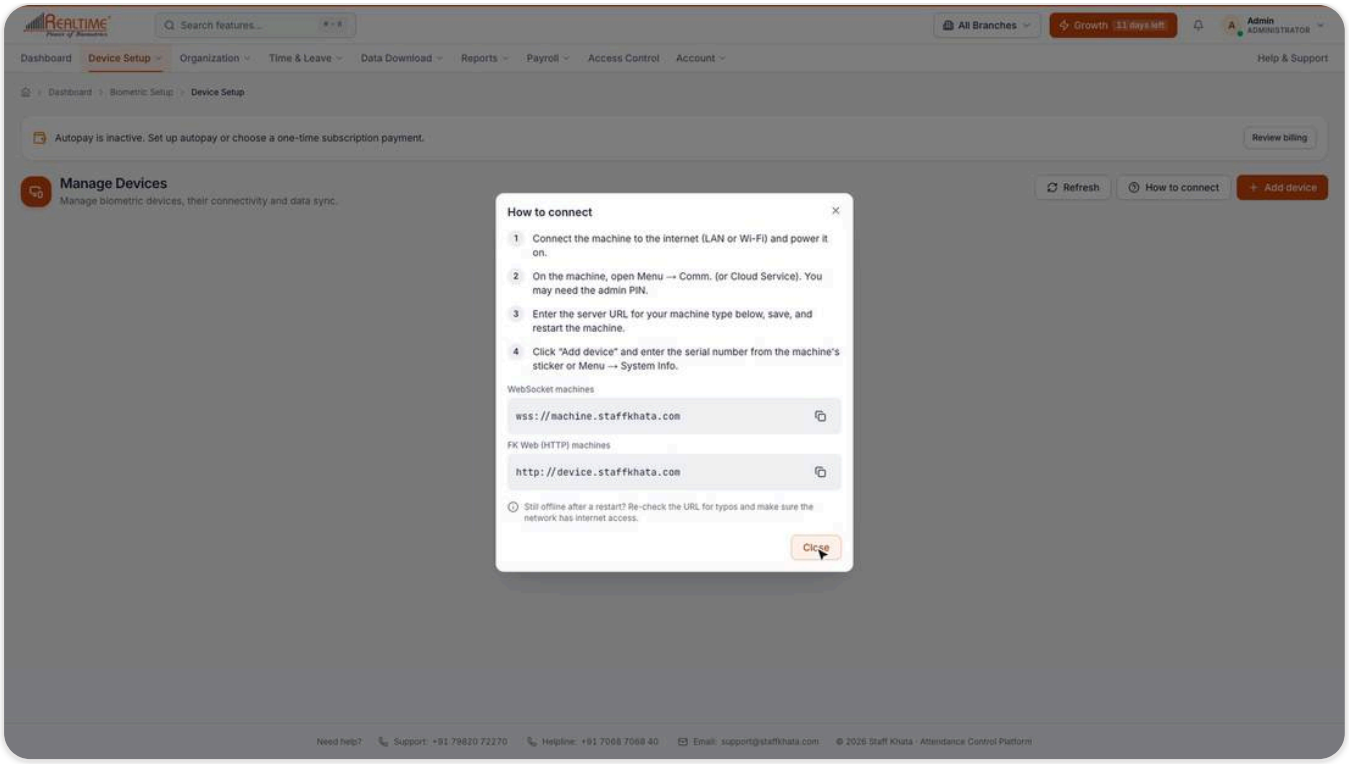
> **Note:** Staff Khata works with **Realtime biometric machines** only.

Point the machine at Staff Khata

The machine sends punches over the internet, so it needs your server address first.

1. Click **Device Setup** → **Manage Devices**.
2. Click **How to connect**. The box lists the steps and the server addresses.
3. Connect the machine to the internet (LAN or Wi-Fi) and power it on.
4. On the machine, open **Menu** → **Comm.** (or **Cloud Service**). You may need the admin PIN.
5. Enter the server address for your machine type, save, and restart the machine:

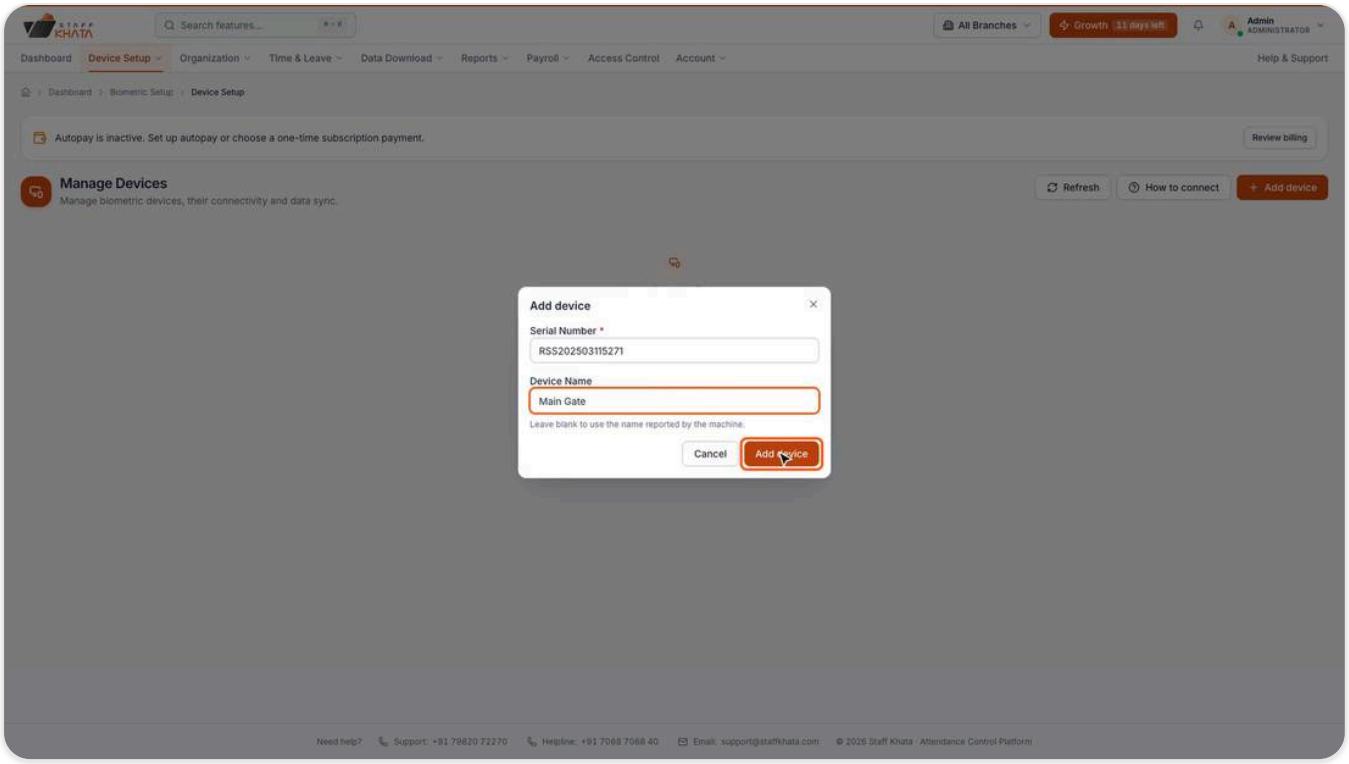
Machine type	Server address
WebSocket machines	`wss://machine.staffkhata.com`
FK Web (HTTP) machines	`http://device.staffkhata.com`



Tip: Click the copy icon next to an address to copy it. Still offline after a restart? Check the address for typos and make sure the network has internet access.

Add the machine by serial number

1. On **Manage Devices**, click **Add device**.
2. Enter the **Serial Number** from the sticker on the machine, or from **Menu → System Info** on the machine.
3. Enter a **Device Name**, such as "Main Gate". Leave it blank to use the name the machine reports.
4. Click **Add device**.



The machine appears in the list. Its status shows **Online** when Staff Khata has heard from it in the last 5 minutes, and **Offline** otherwise.

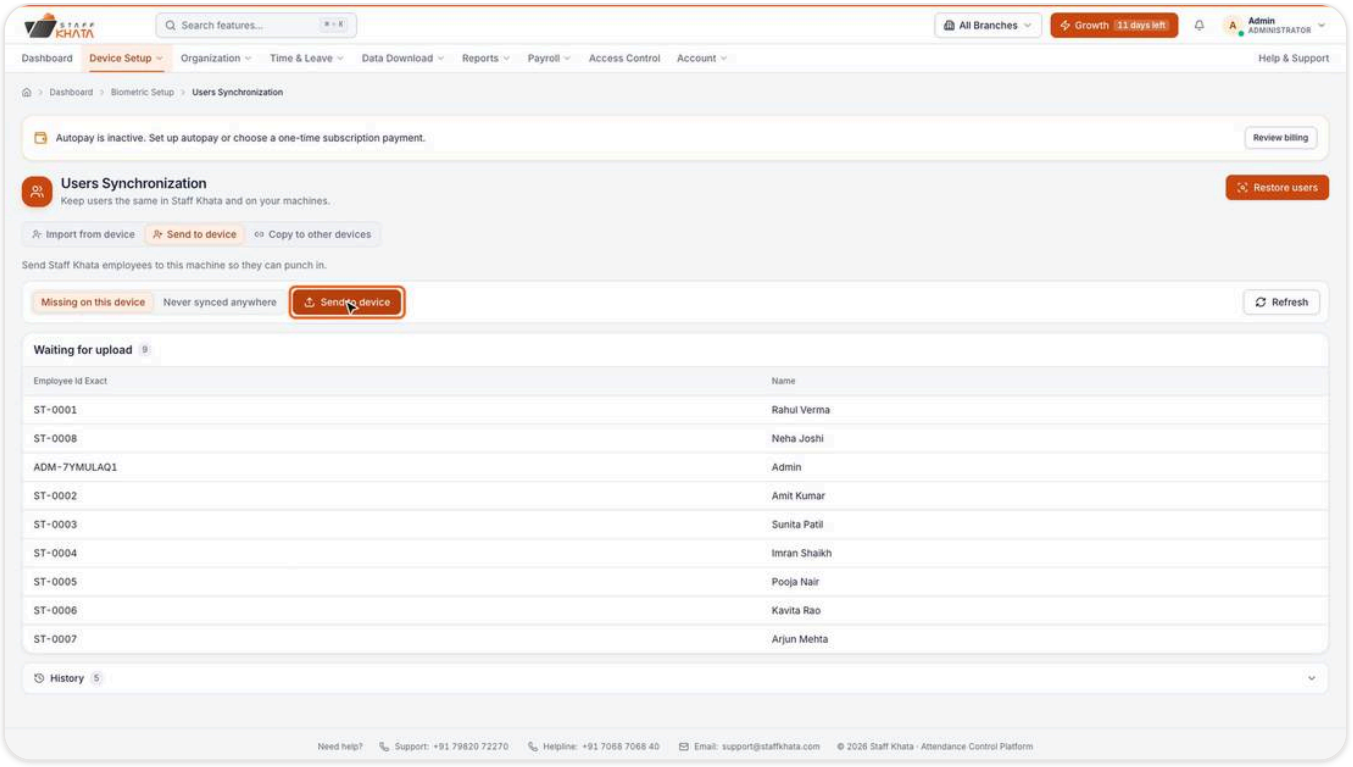
If the serial number is refused, the machine is either already added or has not reached the server yet. Finish the connection steps and try again.

From a machine's ⋯ menu you can **Manage Device** (its users, settings and remote actions), **Edit** its name, or **Delete** it.

Send employees to the machine

A machine only lets people punch who are stored on it.

1. Click **Device Setup** → **Users Synchronization**. If you have more than one machine, pick it at the top.
2. Open **Send to device**. Choose **Missing on this device** to list everyone who is not on the machine yet, or **Never synced anywhere** for employees who have never been sent to any machine.
3. Click **Send to device**, then confirm.



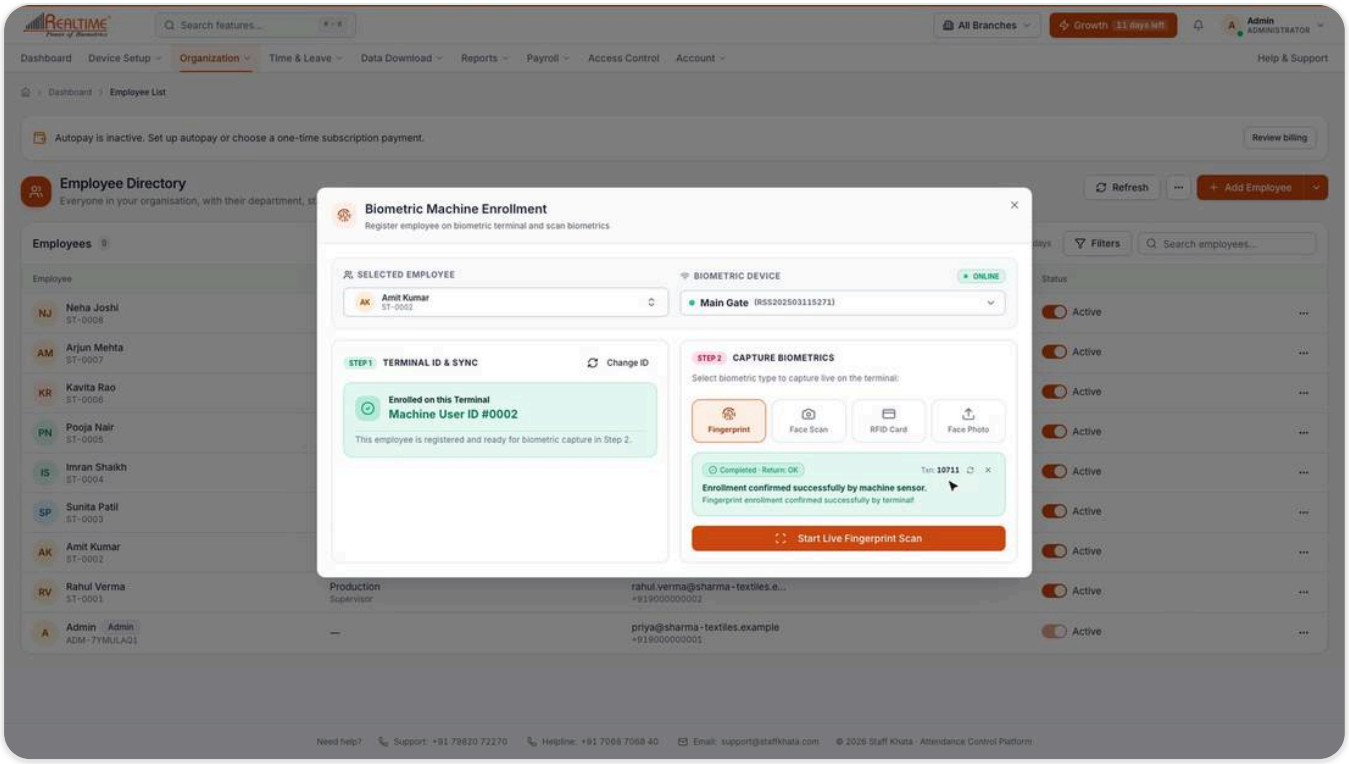
The other tabs help when you start with a machine that already has users. **Import from device** brings its users into Staff Khata, and **Copy to other devices** copies them to another online machine.

To check who can punch on a machine, open **Manage Devices**, click ⋯ → **Manage Device**, and open the **Users** tab. Every machine user is linked to their employee in Staff Khata.

Enrol a fingerprint or card

The machine must be online for this.

1. Click **Organization** → **Employee List**.
2. Click ⋯ on the employee's row and choose **Biometric enrollment**.
3. Pick the **Biometric Device**. Under **Step 1**, the employee is registered on the machine with a **Machine User ID**. If they are not on it yet, click **Sync Employee to Device**.
4. Under **Step 2**, choose **Fingerprint** or **RFID Card**.
5. Click **Start Live Fingerprint Scan**, then ask the employee to place the same finger on the machine three times (or tap their card).

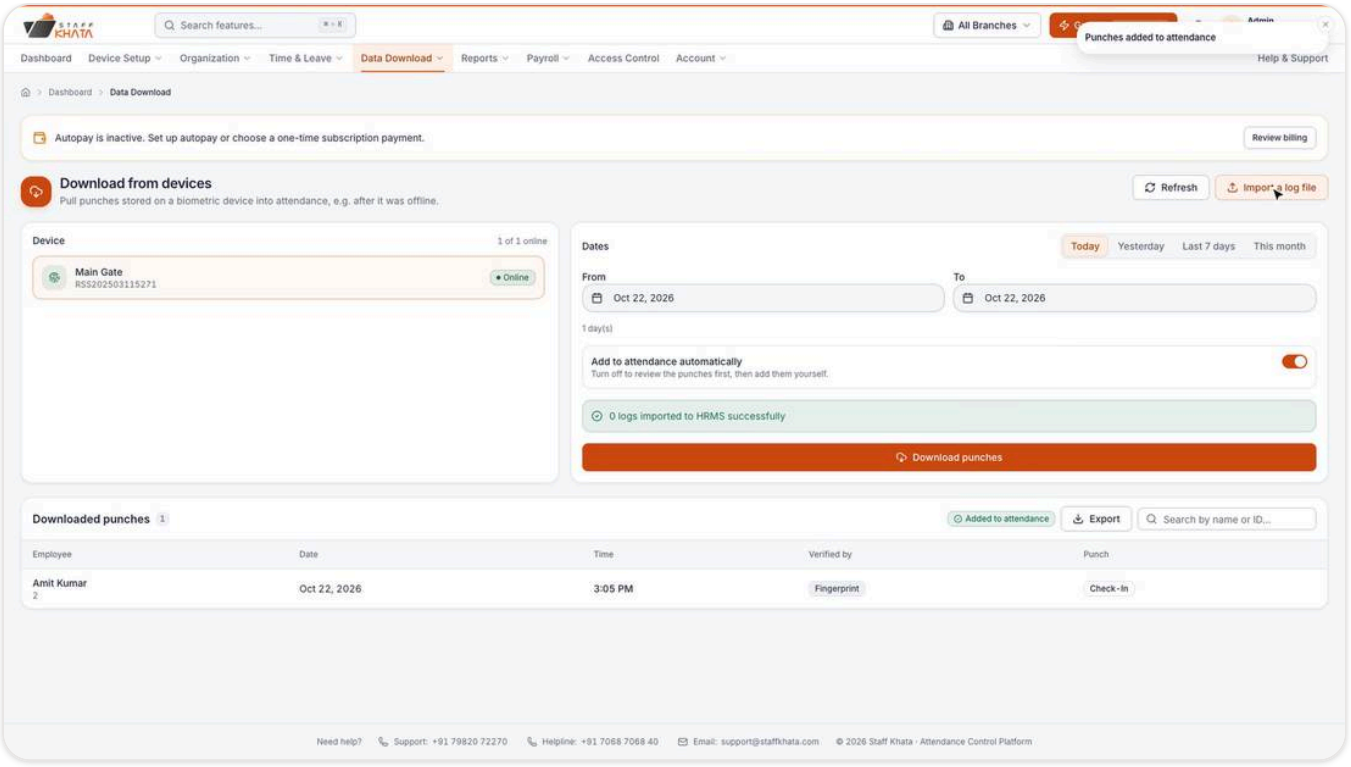


When the machine confirms, the employee can punch. Each punch shows up as a live notification on your dashboard.

Download punches the machine stored

If a machine was offline for a while, it keeps its punches. Pull them in once it is back online.

1. Click **Data Download → Download data from Devices**.
2. Pick the device under **Device**.
3. Choose the dates: **Today**, **Yesterday**, **Last 7 days**, **This month**, or set **From** and **To**. You can download up to 90 days at a time.
4. Leave **Add to attendance automatically** on, or turn it off to review the punches first.
5. Click **Download punches**.



Import a machine log file

If the machine cannot go online, export its punch log over USB and import it.

1. Click **Data Download** → **Import Biometric Machine Logs**.
2. Under **Select Machine Log File**, pick the file (.txt, .csv or .tsv) and click **Upload & Preview Logs**.
3. Check the preview. **Mapped** users are matched to employees; **Unmapped** user IDs are not linked to anyone yet.
4. Set the **From date** and **To date** for which attendance should be calculated.
5. Click **Confirm & Import Attendance**.

> **Plan needed: Data Download** and importing machine logs are part of advanced reports, which can be locked on lower plans. Adding machines, syncing users and enrolment work on every plan.

09

Manage daily attendance

Plan: All plans

All punches, from biometric machines and the mobile app, land on one page. From there you check the day, approve punches and correct mistakes before payroll.

See today at a glance

Your **Dashboard** shows who is present, absent and late today. **Recent Punches** lists every check-in as it happens, and late arrivals are flagged. The map shows where mobile punches came from.

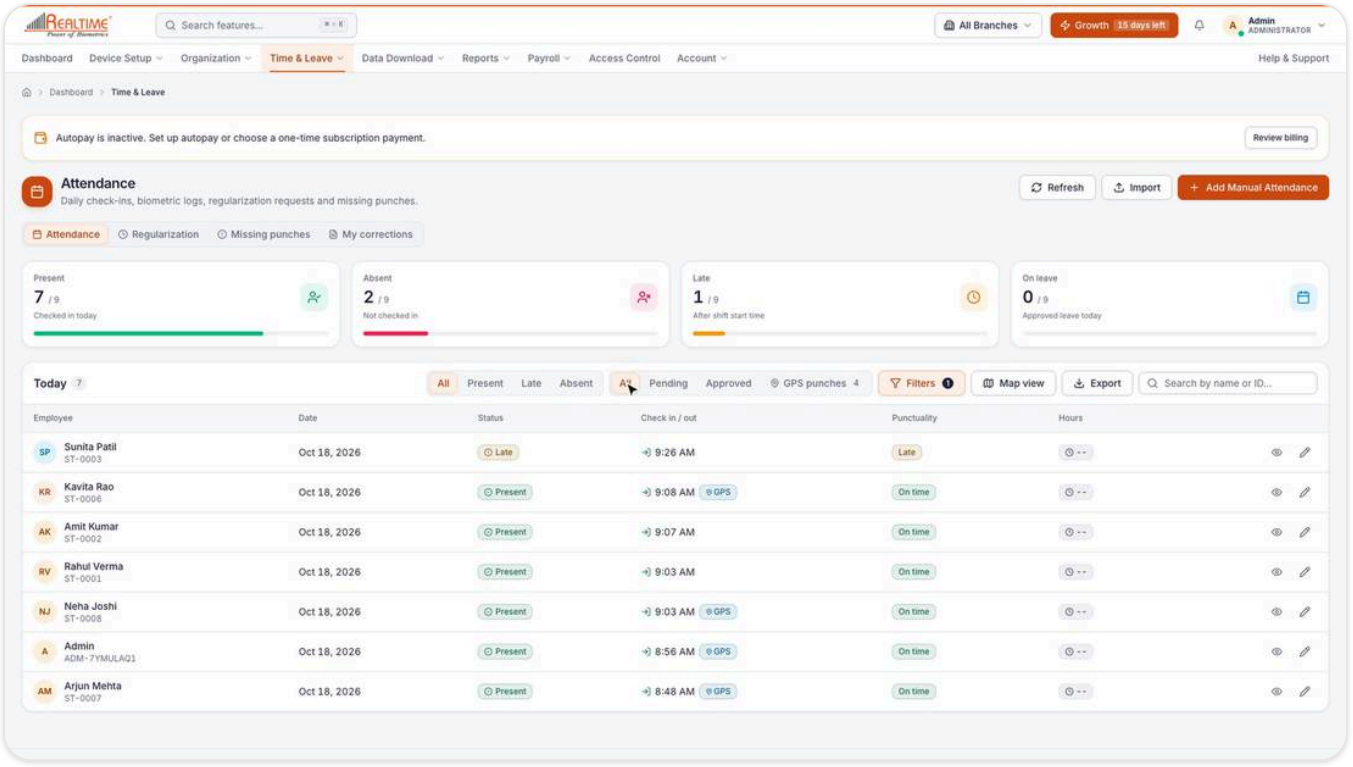
For the full list, click **Time & Leave** → **Attendance Process**.

Filter the Attendance page

The **Attendance** page opens on today. The cards at the top (**Present**, **Absent**, **Late**, **On leave**) show the totals. Click a card to show only those people.

Above the table you have two sets of filters:

Filter	What it shows
All / **Present** / **Late** / **Absent**	Employees by attendance status
Pending	Punches waiting for your approval
Approved	Punches you have already approved
GPS punches	Only punches made from the mobile app, with a location



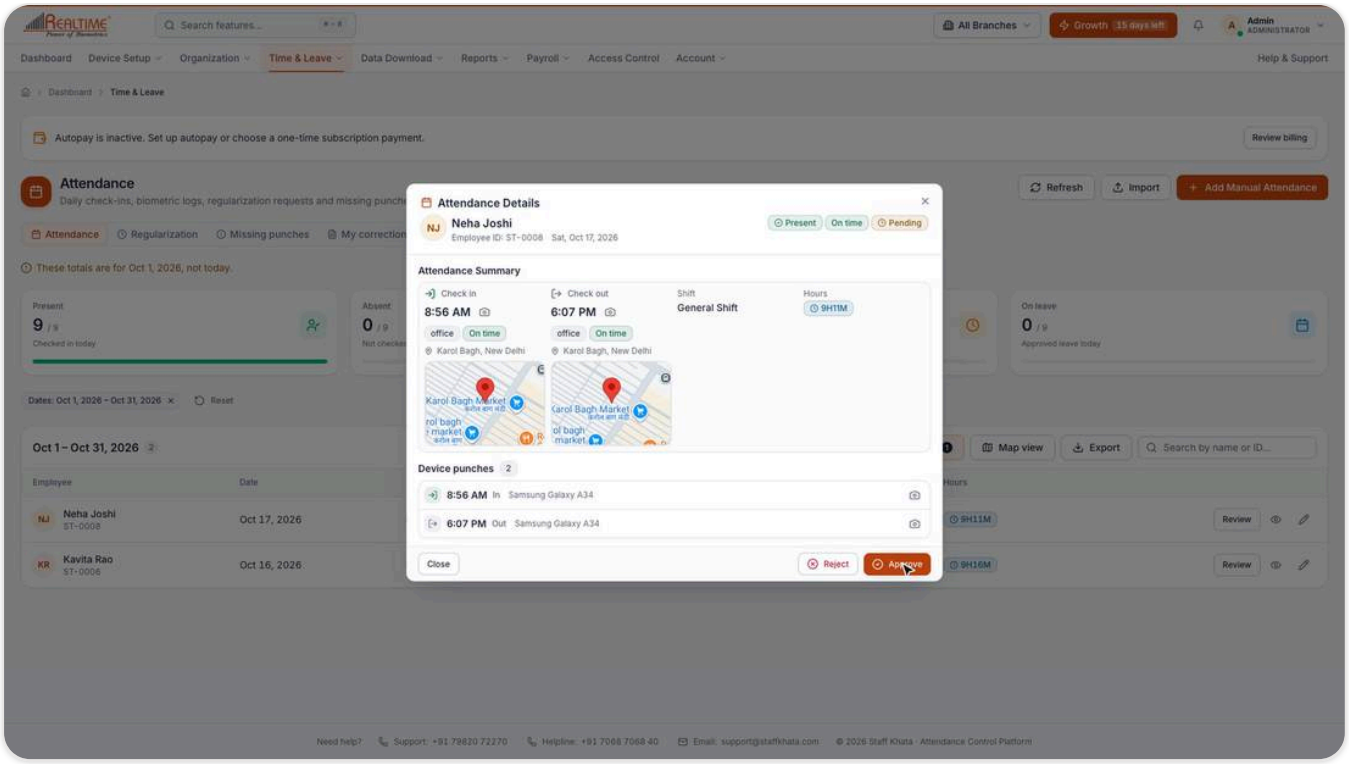
Click **Filters** to choose an employee or a different period, then click **Apply**. Use **All Branches** in the top bar to see one branch. Use **Search by name or ID...** to find one person, and **Export** to download the list.

Click the eye icon on any row to open **Attendance Details**: check-in and check-out times, the device or location used, the shift and hours, and the punch photo for mobile punches.

> **Plan needed:** On lower plans, the period filter is limited to a single day. Viewing a whole month, year or custom range needs a plan with advanced reports.

Approve punches

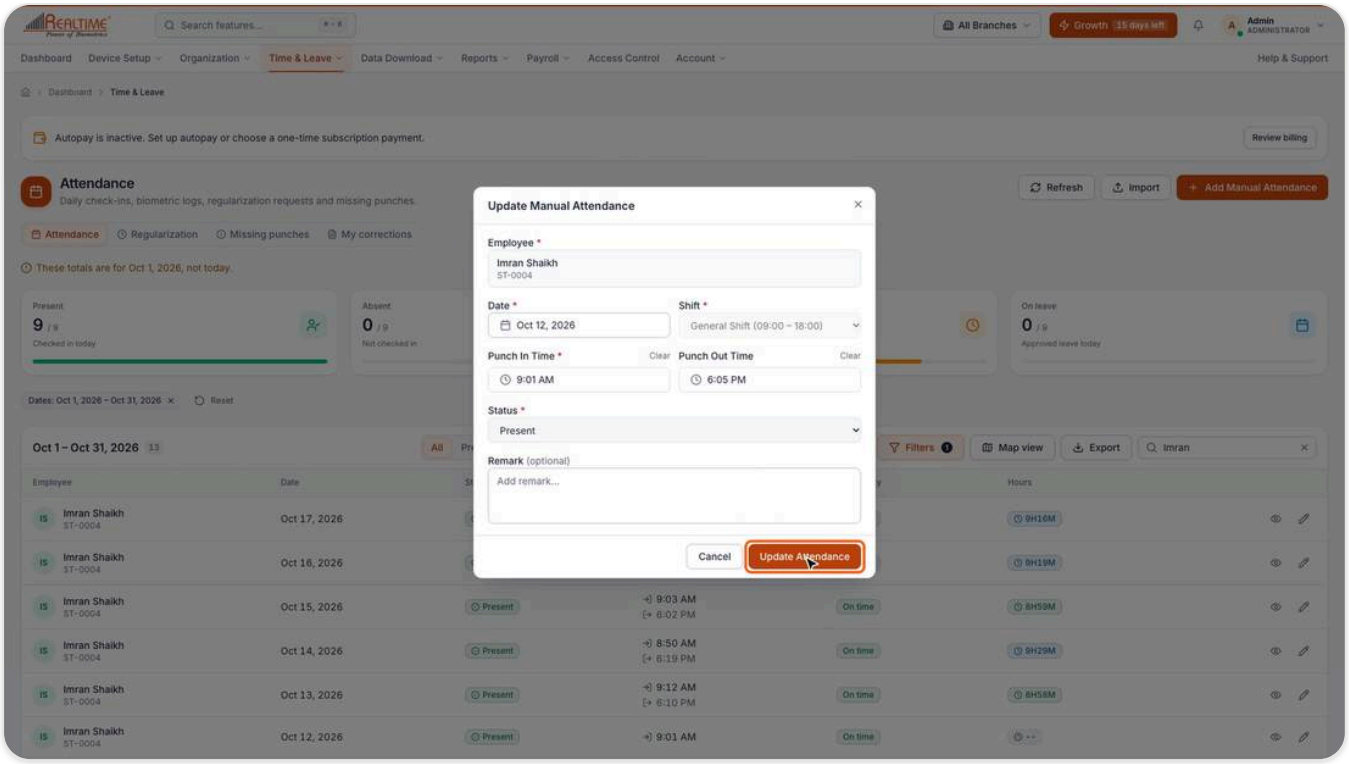
1. Click **Filters**, choose **This Month** under **Quick Select**, and click **Apply**.
2. Click **Pending**.
3. Click **Review** on a row. Check the times, the location and the photo.
4. Click **Approve**, then confirm. To refuse a punch, click **Reject** and give a short reason.



Fix a missing punch-out

When someone forgets to punch out, their hours cannot be worked out. Add the time yourself.

1. Find the day. Search for the employee's name and set the period with **Filters** if it is not today.
2. Click the pencil icon (**Edit**) on that row. **Update Manual Attendance** opens.
3. Set the **Punch Out Time**. Tick **Next day** if they worked past midnight.
4. Click **Update Attendance**. The hours are now calculated.



> **Tip:** The **Missing punches** tab lists everyone with a check-in but no check-out (or the other way round). Click **Add missing check-out**, enter the time, and click **Save attendance**.

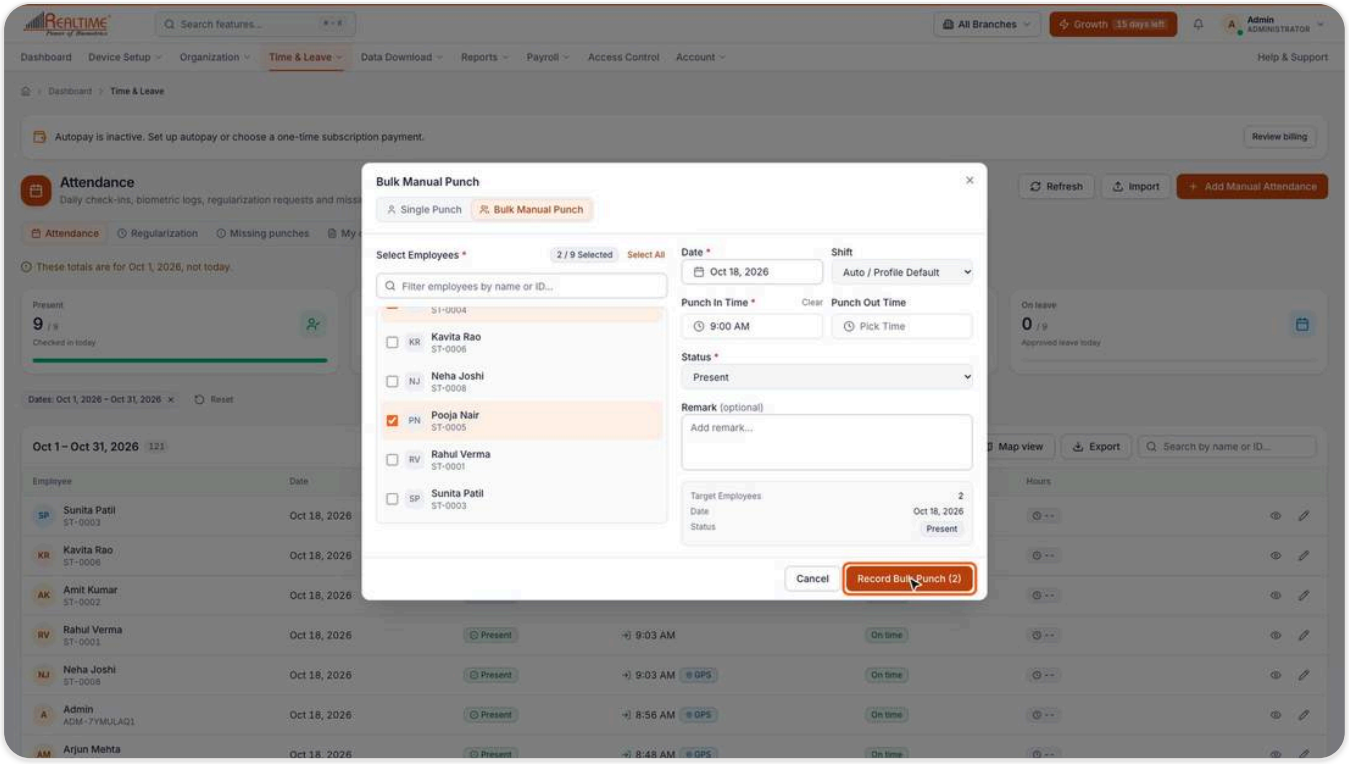
Add attendance by hand (Manual Punch)

Use this when someone could not punch at all, for example on a site visit.

1. Click **Add Manual Attendance** (or **Time & Leave** → **Manual Punch**). Keep **Single Punch** selected.
2. Choose the **Employee**, the **Date** and the **Shift**.
3. Enter the **Punch In Time** and, if known, the **Punch Out Time**.
4. Choose the **Status**: **Present**, **Absent**, **Half Day** or **Leave**. Times are not needed for Absent or Leave.
5. Add a **Remark** if you like, and click **Submit Attendance**.

Mark several people at once (Bulk Manual Punch)

1. Click **Time & Leave → Bulk Manual Punch**, or switch to **Bulk Manual Punch** inside the manual attendance form.
2. Under **Select Employees**, tick each person, or click **Select All**.
3. Set the **Date**, the **Punch In Time** and the **Status**. Leave **Shift** on **Auto / Profile Default** to use each person's own shift.
4. Check the summary, then click **Record Bulk Punch**.

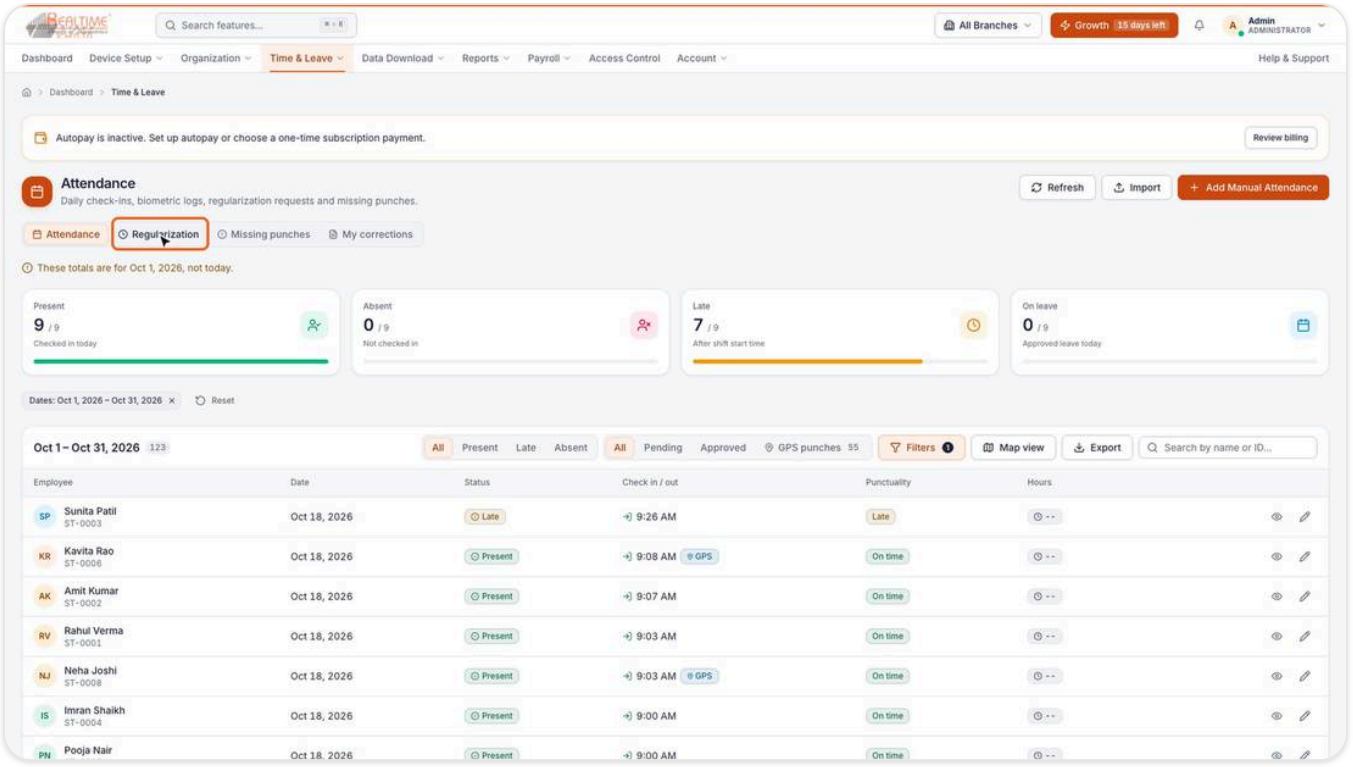


Approve regularization requests

Employees can ask to correct their own punches from the app or the web, with the times they actually worked and a reason.

1. Click **Time & Leave → Regularization**, or open the **Regularization** tab on the Attendance page. The tab shows a count when requests are waiting.
2. Check the requested times and the reason.
3. Click **Approve** or **Reject**. To handle many at once, tick them and use the same action for all.

When you approve, the employee's attendance is updated to the times they asked for.


Search features...
All Branches
Growth 15 days left
Admin
ADMINISTRATOR
Dashboard
Device Setup
Organization
Time & Leave
Data Download
Reports
Payroll
Access Control
Account
Help & Support
Dashboard > Time & Leave
Autopay is inactive. Set up autopay or choose a one-time subscription payment.
Review billing
Attendance
Daily check-ins, biometric logs, regularization requests and missing punches.
Refresh
Import
Add Manual Attendance
Attendance
Regularization
Missing punches
My corrections
These totals are for Oct 1, 2026, not today.
Present
9 / 9
Checked in today
Absent
0 / 9
Not checked in
Late
7 / 9
After shift start time
On leave
0 / 9
Approved leave today
Dates: Oct 1, 2026 – Oct 31, 2026
Reset
Oct 1 – Oct 31, 2026
123
All
Present
Late
Absent
All
Pending
Approved
GPS punches
55
Filters
Map view
Export
Search by name or ID...
Employee
Date
Status
Check in / out
Punctuality
Hours
SP
Sunita Patil
ST-0003
Oct 18, 2026
Late
9:26 AM
Late
KR
Kavita Rao
ST-0006
Oct 18, 2026
Present
9:08 AM
GPS
On time
AK
Amit Kumar
ST-0002
Oct 18, 2026
Present
9:07 AM
On time
RV
Rahul Verma
ST-0001
Oct 18, 2026
Present
9:03 AM
On time
NJ
Neha Joshi
ST-0008
Oct 18, 2026
Present
9:03 AM
GPS
On time
IS
Imran Shaikh
ST-0004
Oct 18, 2026
Present
9:00 AM
On time
PN
Pooja Nair
Oct 18, 2026
Present
9:00 AM
On time

10

Leave types, leave requests and holidays

Plan: Plans with leave and holidays

Set up the kinds of leave your staff can take and your holiday list once. After that, leave requests, balances and holidays flow into attendance and payroll on their own.

> **Plan needed:** Leave management and holidays can be locked on lower plans. If the menus show a lock, see **Billing & Plan** for current prices and plans.

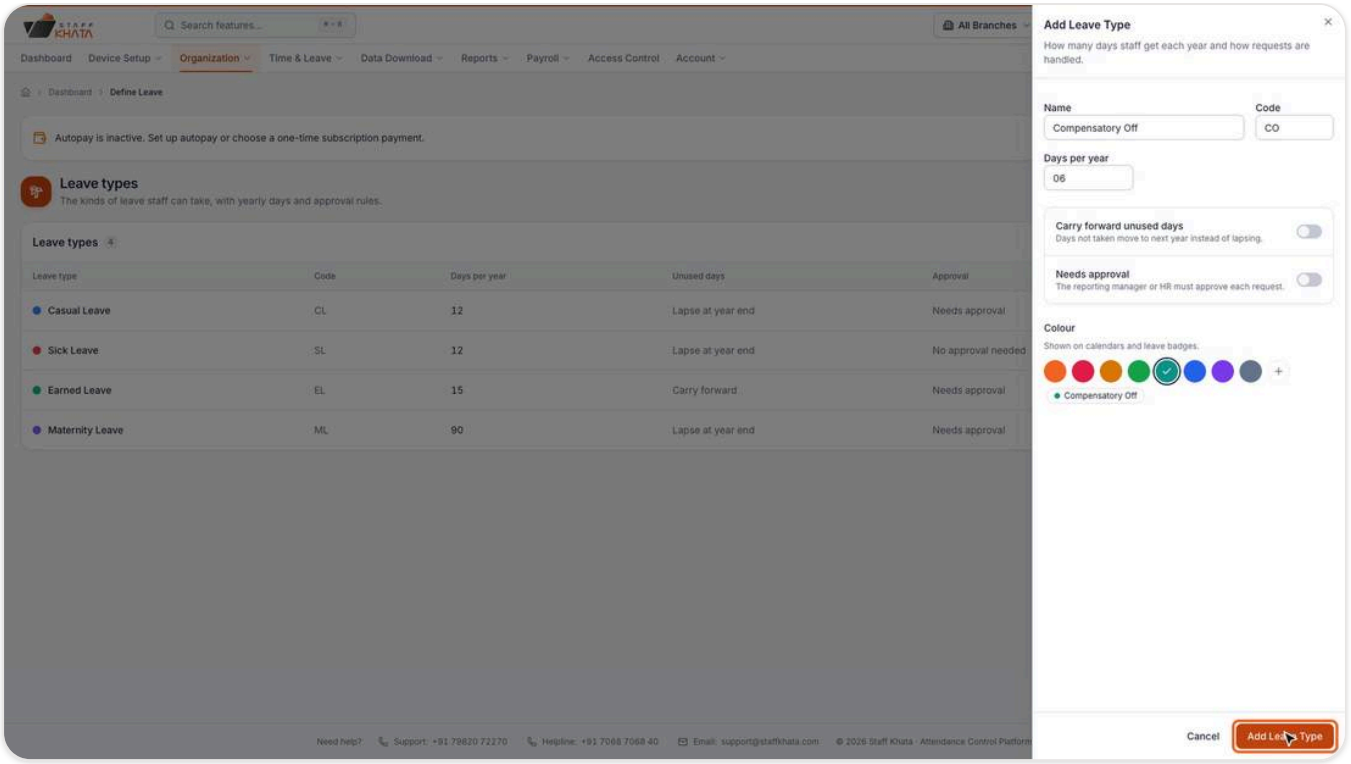
Define leave types

Casual, Sick, Earned and Maternity leave are already set up for you. Edit them or add your own.

1. Click **Organization** → **Define Leave**. The **Leave types** list shows each type's code, days per year, what happens to unused days, and whether it needs approval.
2. Click **Add Leave Type**.
3. Fill in the form:

Setting	What it does
Name and **Code**	For example "Compensatory Off" and "CO". Both are required.
Days per year	How many days each employee gets in a year.
Carry forward unused days	On: days not taken move to next year. Off: they lapse at year end.
Needs approval	On: the reporting manager or HR must approve each request.
Colour	Shown on calendars and leave badges.

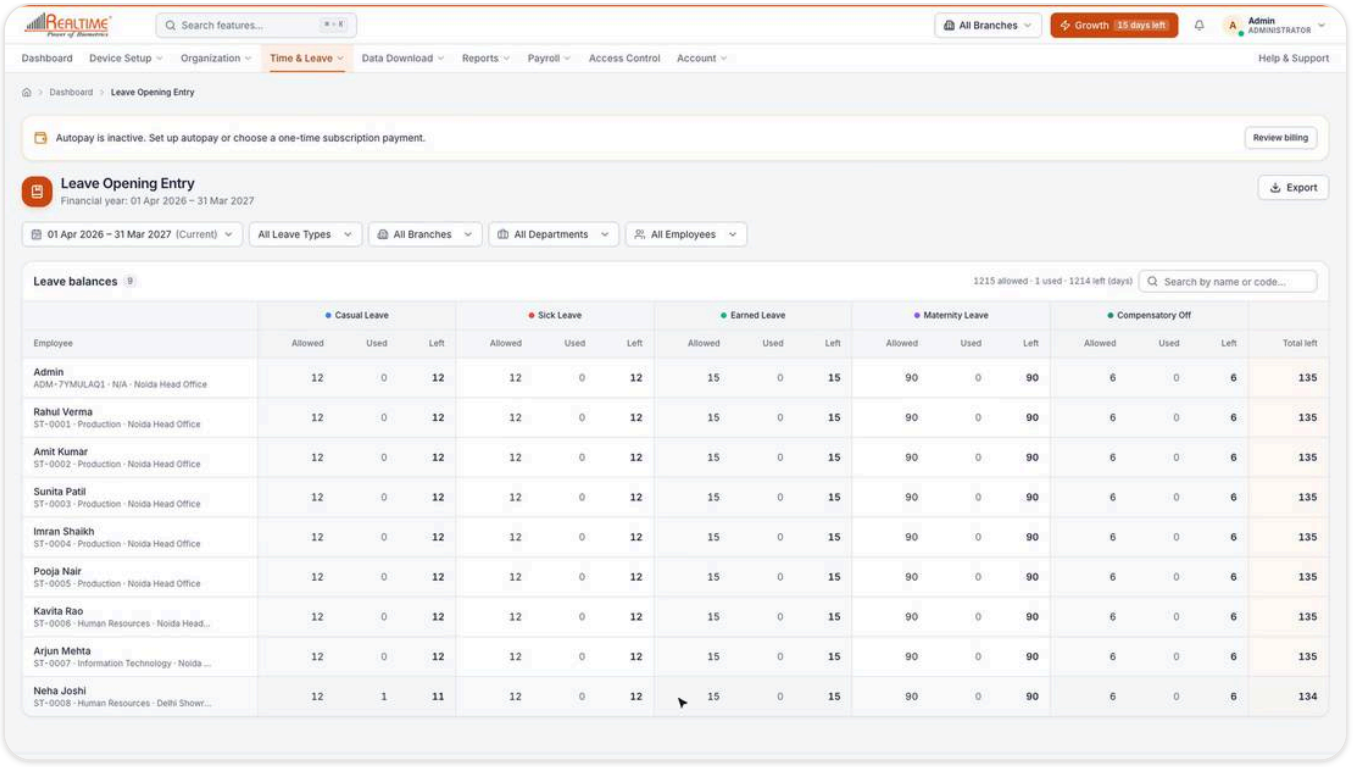
4. Click **Add Leave Type**.



To change or remove a type, use **Edit** or **Delete** on its row.

Check leave balances (Leave Opening Entry)

1. Click **Time & Leave → Leave Opening Entry**.
2. For each employee and leave type you see days **Allowed**, **Used** and **Left**, plus **Total left**.
3. Change the financial year at the top left, or filter by leave type, branch, department or employee. Click **Export** to download the table.



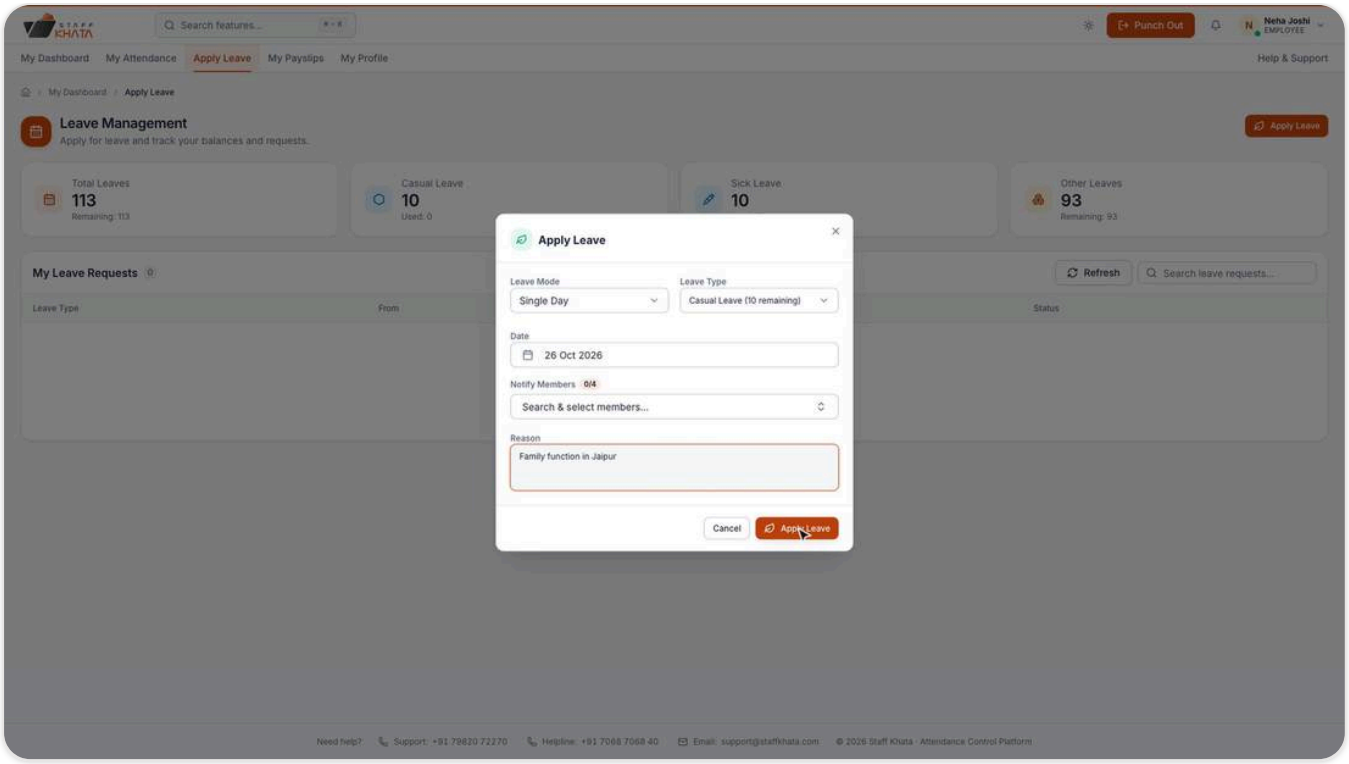
How employees apply for leave

Employees sign in with their own email and password, on the web at https://attendance.staffkhata.com or in the Staff Khata app (the **Leave** tab). They open **Apply Leave**, see their balance for each leave type, choose the type and dates, add a reason and send it. The request then waits for approval.

Apply leave on an employee's behalf

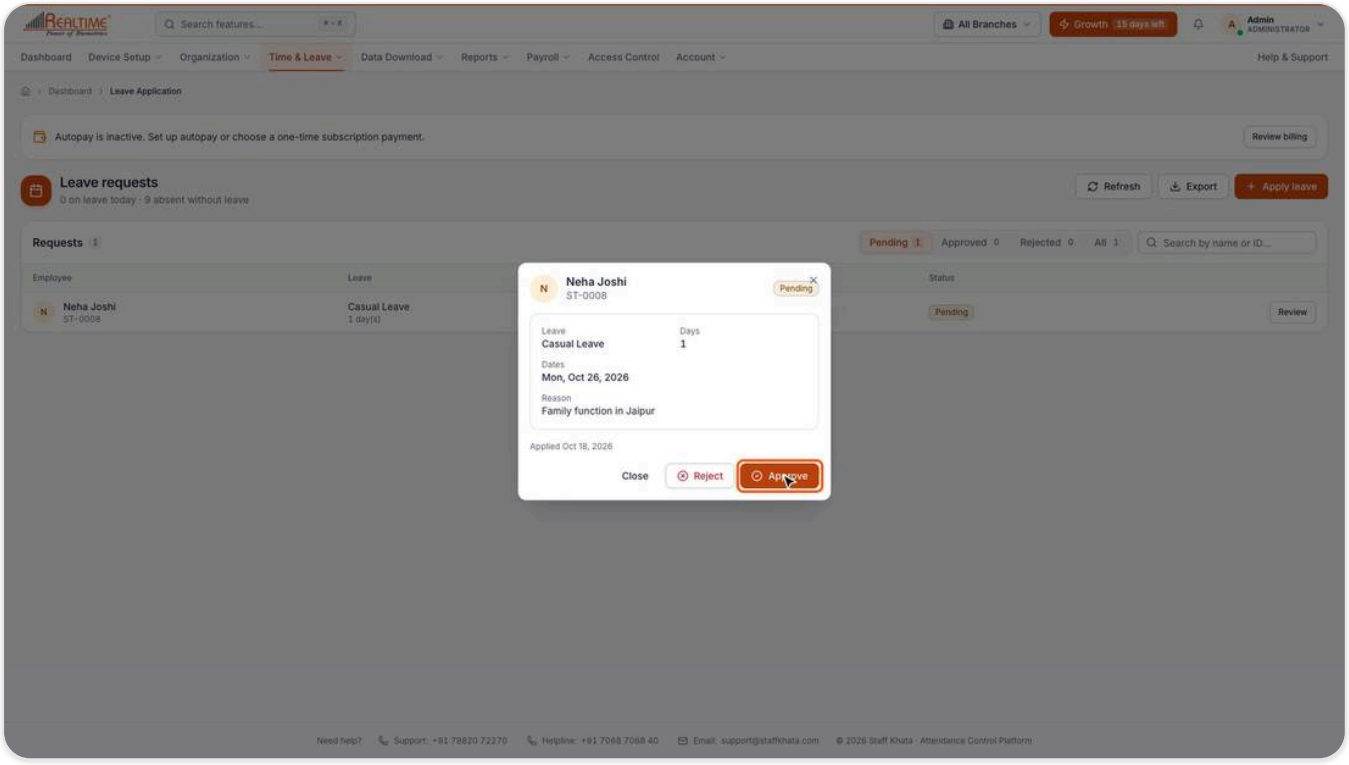
Useful when someone phones in sick or does not use the app.

1. Click **Time & Leave** → **Leave Application**.
2. Click **Apply leave**.
3. Choose the **Employee**, then the **Leave type**. The days left are shown next to each type.
4. Choose **One day**, **Half a day** or **Several days**, and pick the date or dates.
5. Add a **Reason**. Under **Also notify**, you can pick people to inform.
6. Click **Apply leave**.



Approve or reject leave

1. Click **Time & Leave → Leave Application**. **Leave requests** opens on **Pending**.
2. Click **Review** on a request. Check the leave type, dates, days and reason.
3. Click **Approve** or **Reject**, then confirm.



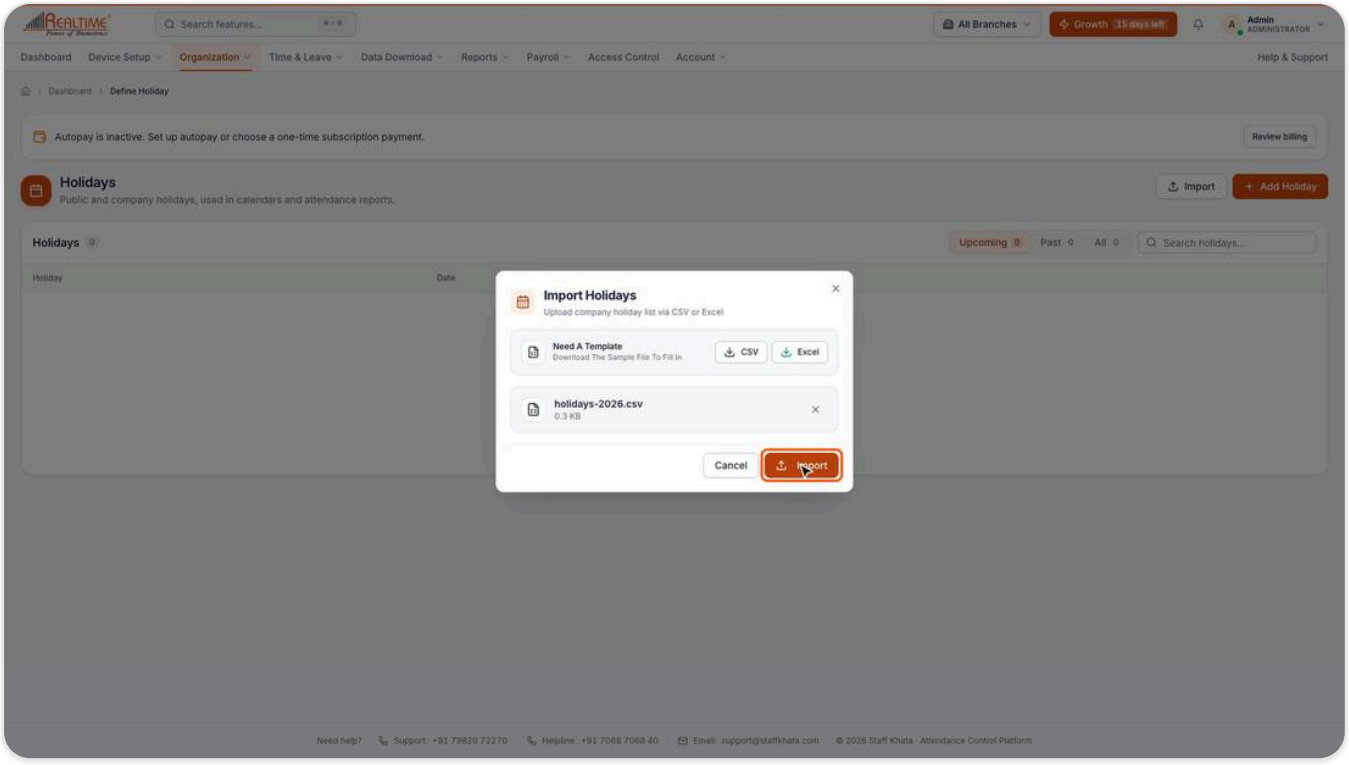
The **Approved**, **Rejected** and **All** tabs keep the history. You can still change a decision later from a request's details.

Add your holidays

Holidays are shown on calendars and used in attendance reports. The quickest start is to import your list.

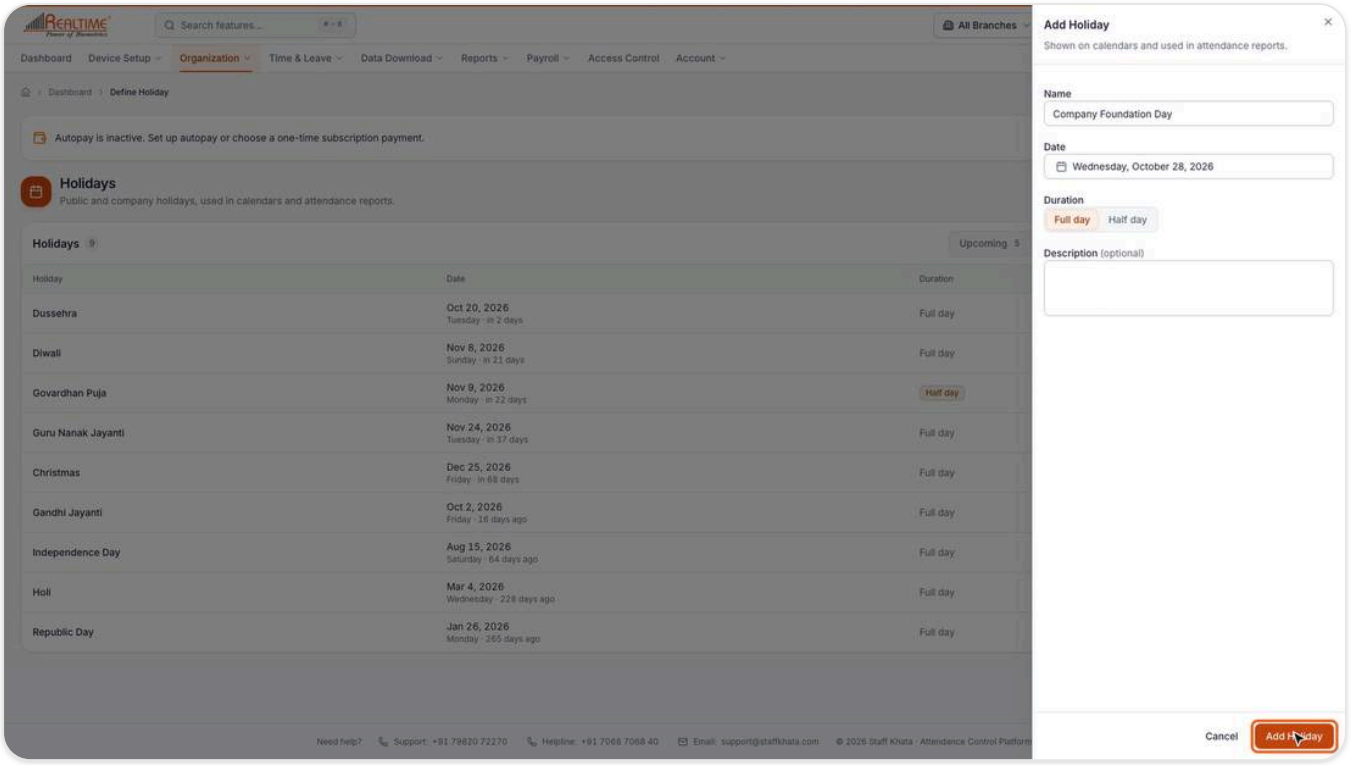
Import from a spreadsheet

1. Click **Organization** → **Define Holiday**.
2. Click **Import**.
3. Under **Need A Template**, click **CSV** or **Excel** to download a sample. It has three columns: **Holiday Name**, **Type** (Full Day or Half Day) and **Date** (DD-MM-YYYY).
4. Fill it in, then drag the file into the box or click to browse. CSV, XLS and XLSX files up to 2 MB work.
5. Click **Import**. All your holidays are added at once.



Add one holiday

1. On **Define Holiday**, click **Add Holiday**.
2. Enter the **Name**, pick the **Date**, and choose **Full day** or **Half day**. A **Description** is optional.
3. Click **Add Holiday**.



Use the **Upcoming**, **Past** and **All** tabs to browse the list, and **Edit** or **Delete** on a row to change it.

11

Payroll, payslips and advances

Plan: Payroll plans

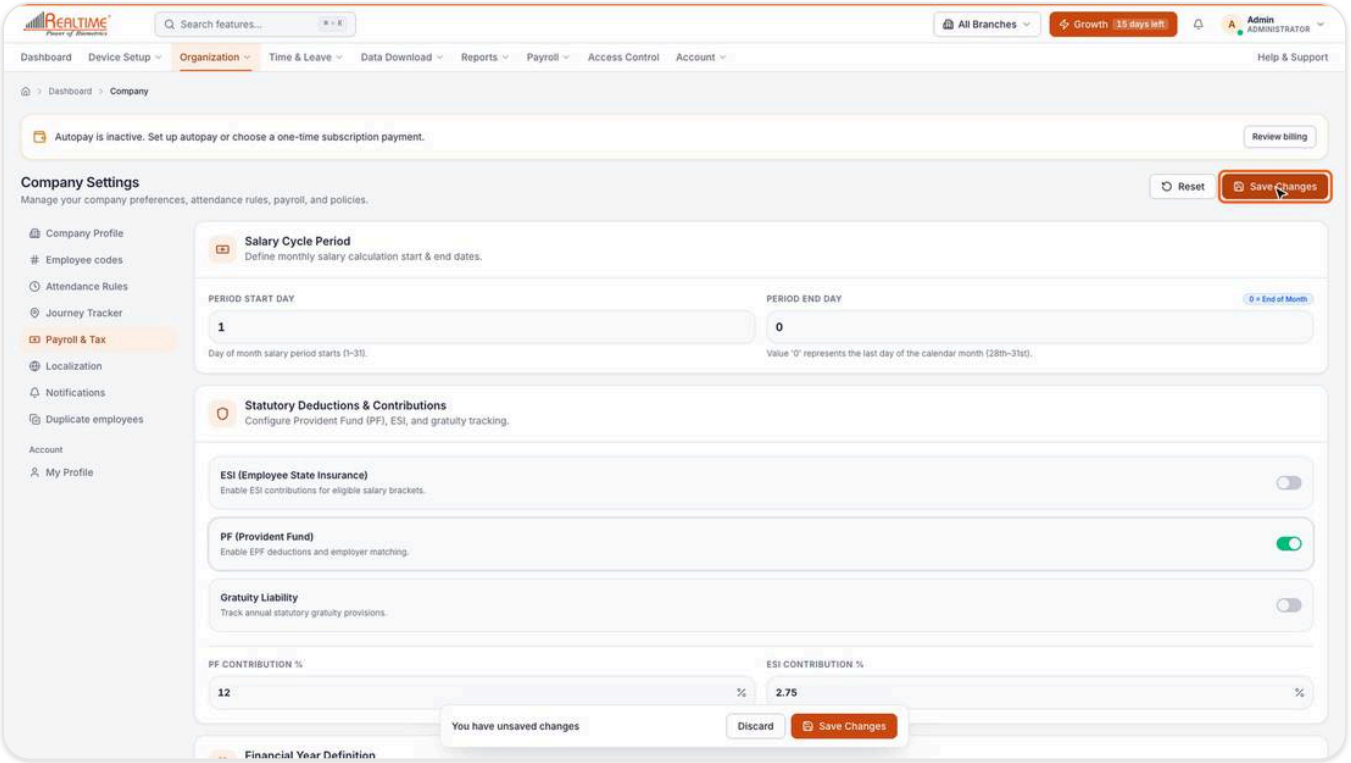
Staff Khata works out each salary from attendance, leave, holidays and late marks, so you don't need a spreadsheet. Set it up once, then run payroll every month in a few clicks.

> **Plan needed:** Payroll needs a paid plan that includes payroll. If the **Payroll** menu is locked, see **Billing & Plan** for current plans.

Set the salary cycle and statutory deductions

These settings apply to every payroll run.

1. Click **Organization** → **Company**, then open the **Payroll & Tax** tab.
2. Under **Salary Cycle Period**, set **Period Start Day** and **Period End Day**. Enter **0** as the end day for "last day of the month".
3. Under **Statutory Deductions & Contributions**, switch on what applies to you.
4. Click **Save Changes**.



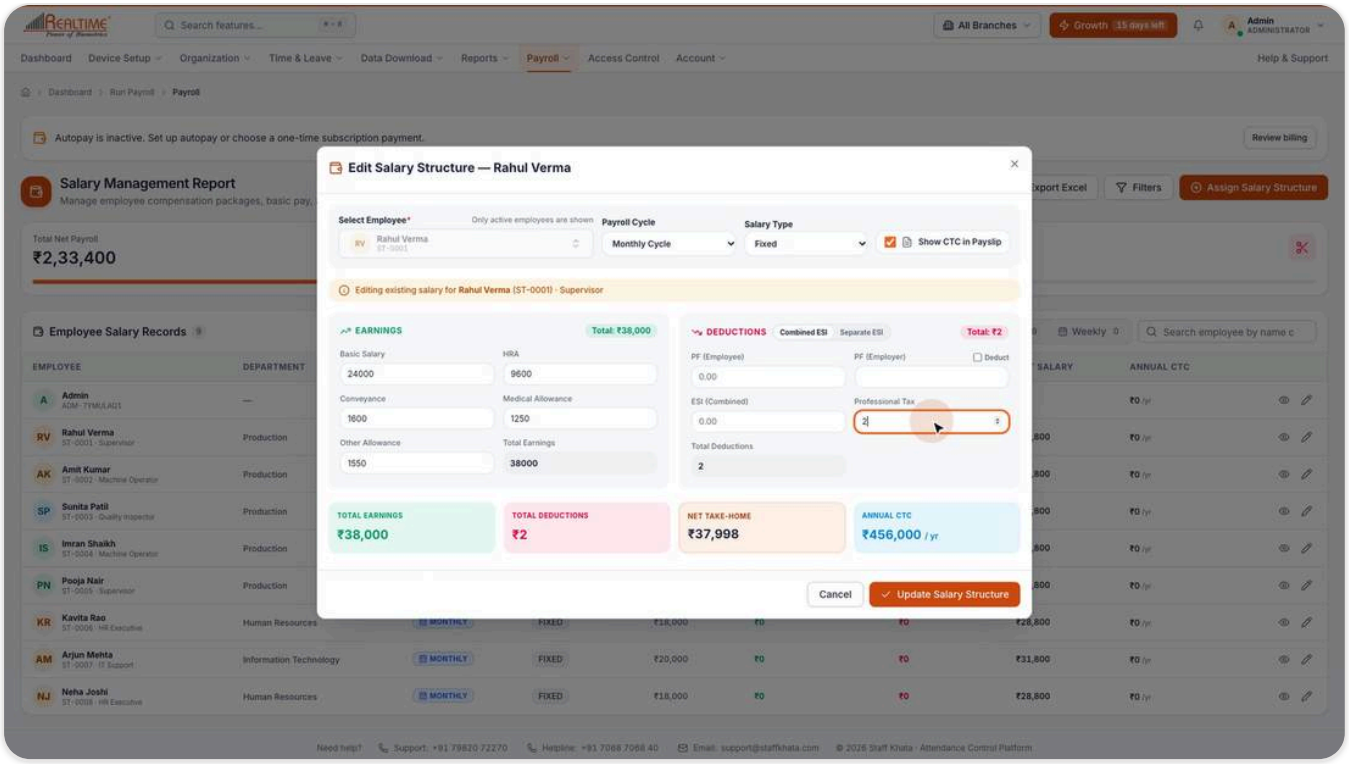
Setting	What it does
ESI (Employee State Insurance)	Adds ESI contributions for eligible salaries. Set the rate in **ESI Contribution %**.
PF (Provident Fund)	Adds EPF deductions and employer matching. Set the rate in **PF Contribution %**, usually 12.
Gratuity Liability	Tracks yearly gratuity provisions.
Financial Year Start / End	The year used for financial reporting.

Assign a salary structure

Every employee needs a salary structure before payroll can run.

1. Click **Payroll → Salary Management**. Every employee is listed with their cycle, earnings, deductions, net salary and annual CTC.
2. Click the edit icon on an employee's row, or click **Assign Salary Structure** for someone new.
3. Choose the **Payroll Cycle** (**Monthly Cycle** or **Weekly Cycle**) and the **Salary Type** (**Fixed**, **Variable** or **Commission Based**).
4. Fill in **Earnings**: Basic Salary, HRA, Conveyance, Medical Allowance and Other Allowance.
5. Fill in **Deductions**, such as PF, ESI and Professional Tax. ESI can be shown combined or separate.
6. Tick **Show CTC in Payslip** if the employee should see their yearly cost to company.
7. Click **Save Salary Structure** (or **Update Salary Structure**).

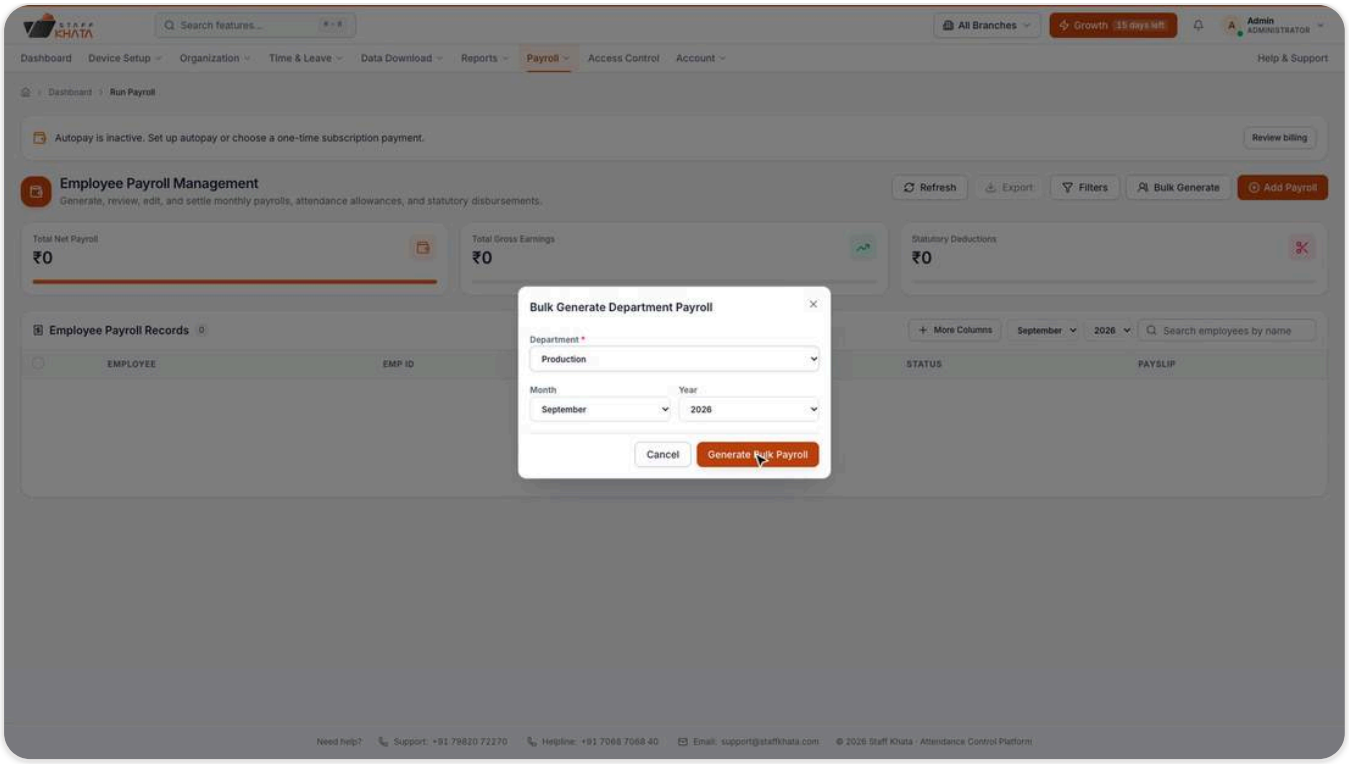
As you type, the totals at the bottom show **Total Earnings**, **Total Deductions**, **Net Take-Home** and **Annual CTC**.



> **Tip:** You can also open this form from **Organization → Employee List**: open an employee's row menu and click **Assign / View Salary**.

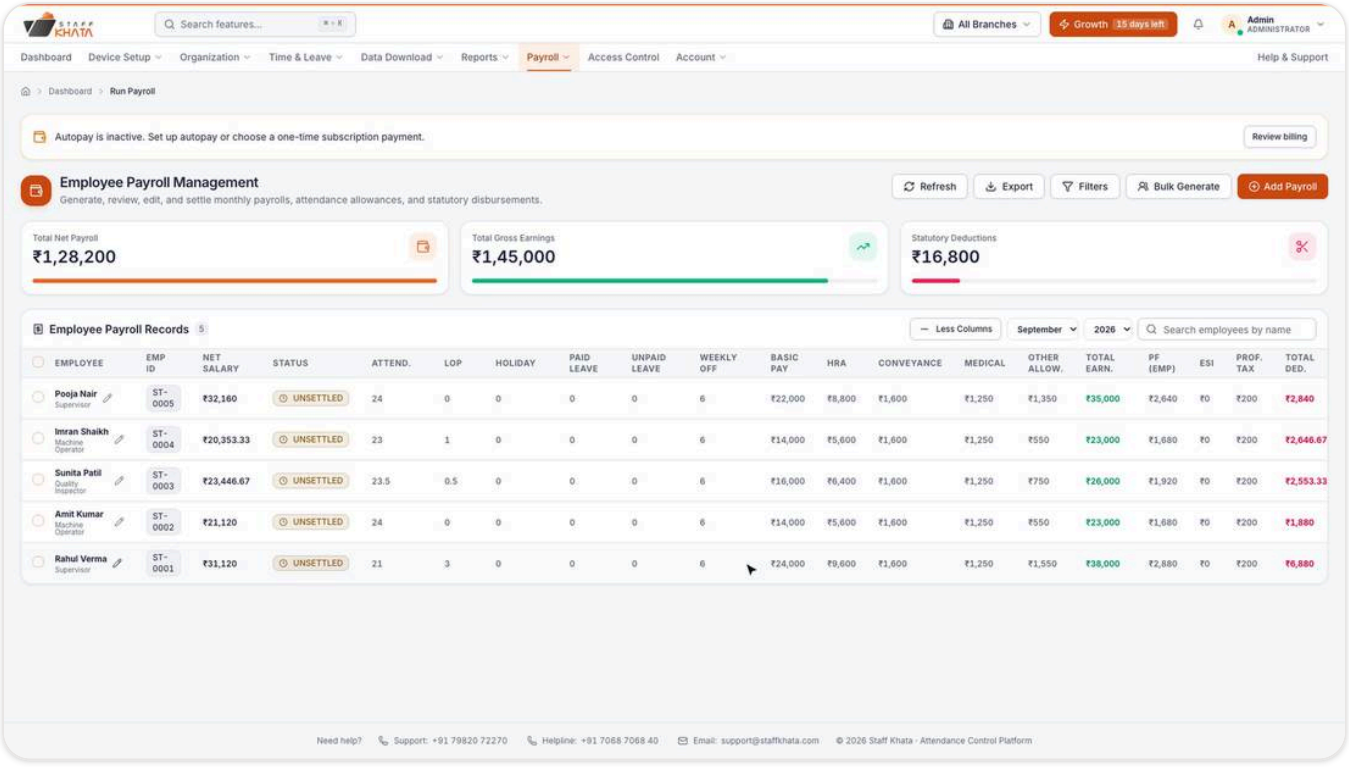
Run monthly payroll

1. Click **Payroll → Run Payroll**.
2. Pick the month and year at the top of the table.
3. Click **Bulk Generate**, choose a **Department**, check the month and year, and click **Generate Bulk Payroll**. Repeat for each department.



To pay one person only, click **Add Payroll** and pick the employee.

Click **More Columns** to see the working days, loss of pay (LOP) days, weekly offs, holidays and paid leave behind each salary.



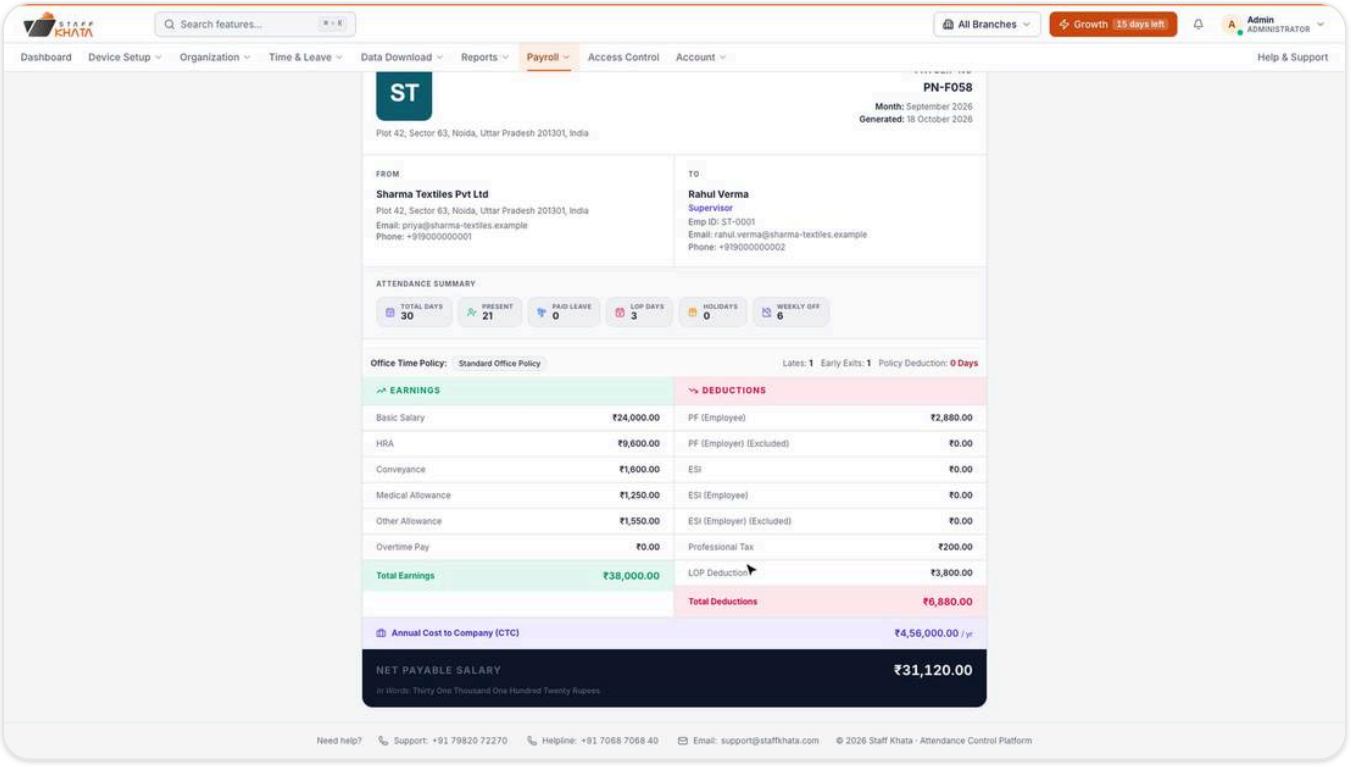
Correct and settle

- To change a figure, edit the employee's payroll row. In **Edit Monthly Payroll**, click **Save Draft** to keep it open, or **Settle & Save** once it is paid.
- To mark many salaries as paid, tick the rows and click **Settle Selected**.
- Use **Export** to download the month as Excel or PDF.

View and download payslips

Click **Payslip** on an employee's row. The payslip shows your logo, the attendance summary, earnings, deductions, any reimbursements, and net pay in words. It also shows how the office time policy was applied: late marks, early exits and any policy deduction.

Click **Download PDF** to save it, or **Print**. Use **Show Annual CTC** / **Hide Annual CTC** to choose whether CTC appears.

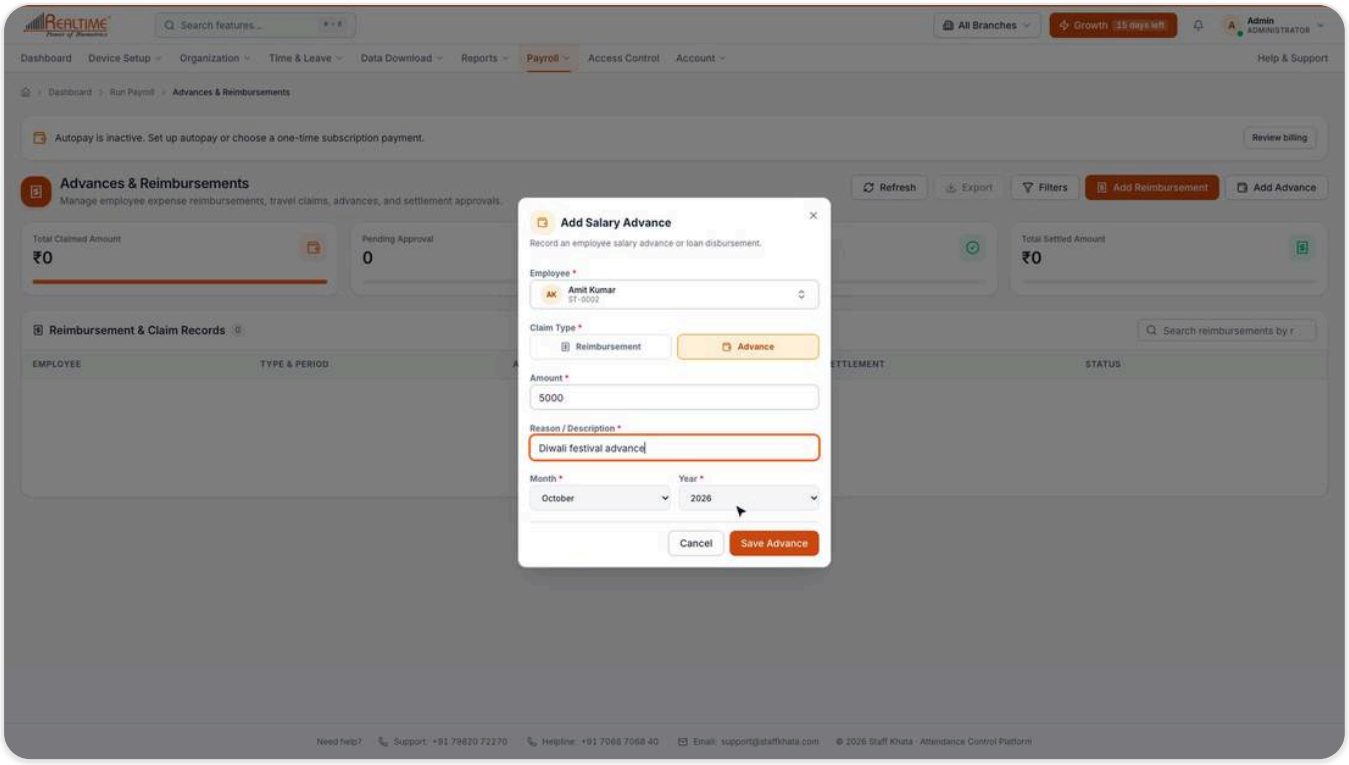


Employees with a login see their own payslips under **My Payslips**. See Employee self-service.

Advances and reimbursements

Record a salary advance

1. Click **Payroll → Add Advance**.
2. Pick the **Employee**, enter the **Amount** and **Reason / Description**, and choose the **Month** and **Year**.
3. Click **Save Advance**.



Record a reimbursement

1. Click **Payroll → Add Reimbursement**.
2. Pick the employee, enter the amount, reason, month and year.
3. Attach the bill under **Supporting Document / Bill** (PDF, JPG, PNG or DOC, up to 2 MB). A bill is required.
4. Click **Submit Claim**.

Approve, settle and print a slip

Open **Payroll → Advances & Reimbursements** to see every advance and claim, including those employees send from the mobile app. Open a record to **Approve** or **Reject** it, then

Settle Request once paid. Click **Generate Slip** for a reimbursement slip you can download as a PDF.

Weekly Pay Process

For staff paid weekly, set their **Payroll Cycle** to **Weekly Cycle** in the salary structure. Only these employees appear here.

1. Click **Payroll → Weekly Pay Process**.
2. Pick the week.
3. Click **Generate Weekly** for one employee, or **Bulk Department → Run Bulk Process** for a whole department.
4. Open a **Weekly Payslip** to download a **PDF**, **Print** it or **Send Email** to the employee.
5. Tick paid rows and click **Settle Selected**.

12

Attendance reports and government registers

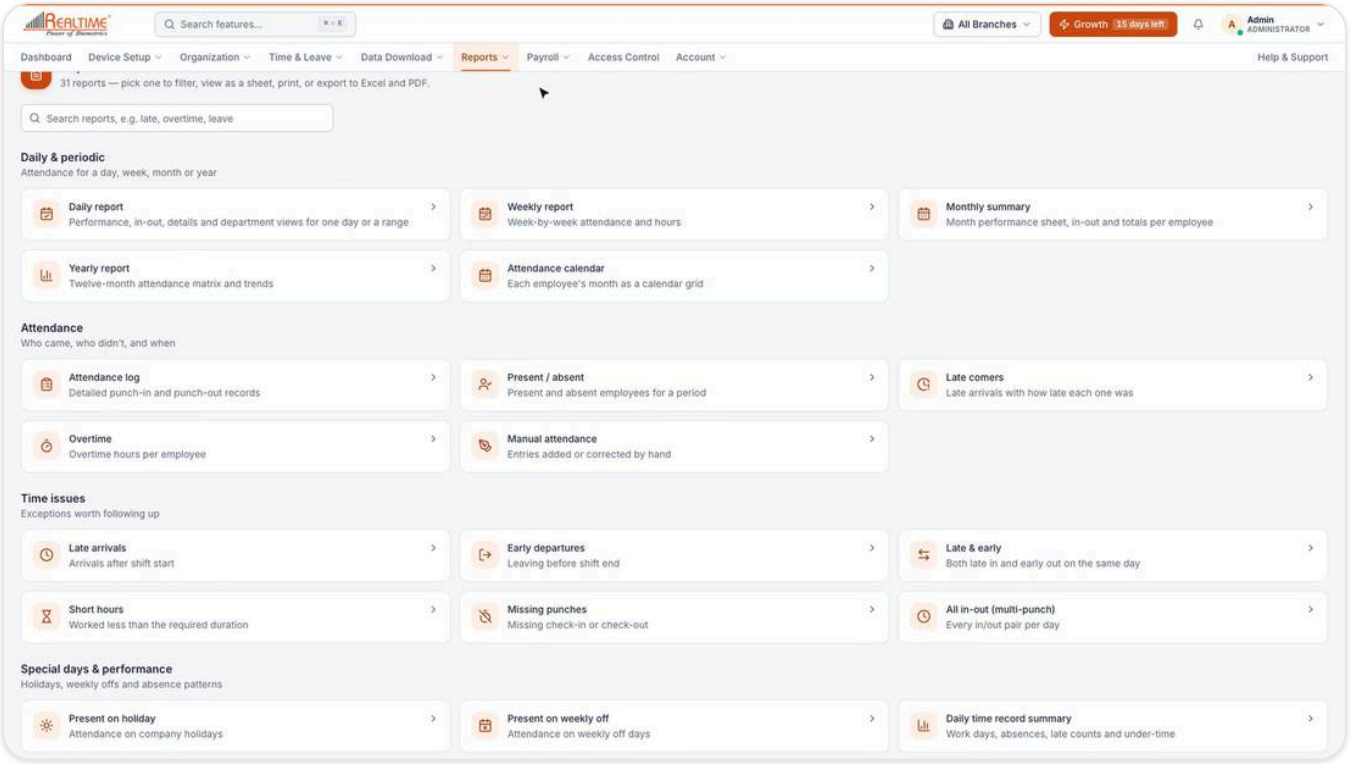
Plan: All plans

Staff Khata has more than thirty reports, from today's attendance to the statutory registers an inspector asks for. Every report can be filtered, viewed as a print-ready sheet, and exported.

> **Plan needed:** The Daily report works on every plan. Weekly, Monthly and Yearly reports, the Attendance Calendar, AI Analysis and the other detailed reports need a paid plan with advanced reports. Government Reports also need payroll. See **Billing & Plan** for current plans.

Find a report

1. Click **Reports → All reports**. Reports are grouped by what you want to know: daily and periodic, attendance, time issues, special days, teams, leave, devices, and compliance.
2. Type in the search box to narrow the list. For example, type **late** to see every report about late arrivals.

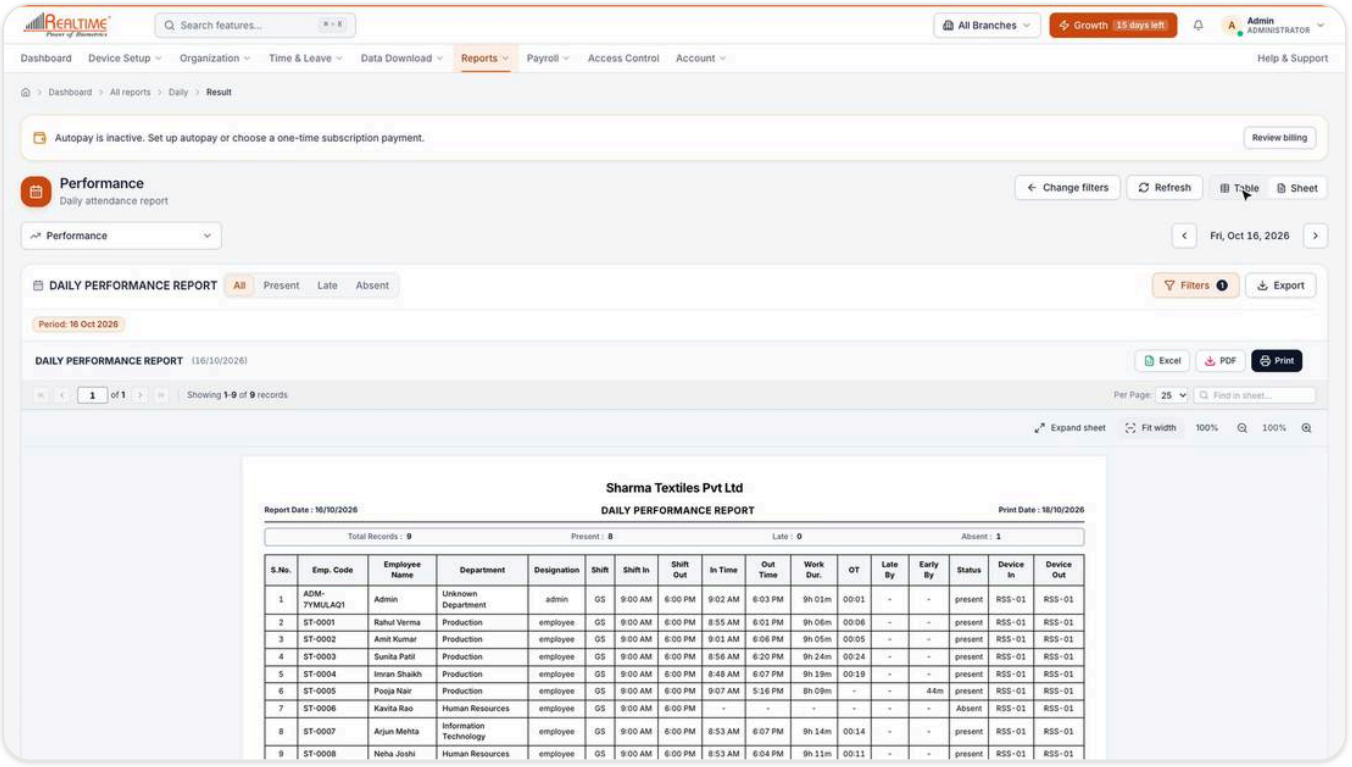


Daily report

1. Click **Reports** → **Daily**.
2. Pick a report type (for example **Performance**, **Late Arrival**, **Absent** or **Missing Punch**), the date, and who to include: branches, departments, designations or single employees.
3. Click **View Report**.

On the result:

- Use the arrows next to the date to step back or forward a day.
- Click **All**, **Present**, **Late** or **Absent** to filter.
- Click **Sheet** for a print-ready layout with your company name, the date, and each employee's in time, out time and hours worked. Click **Table** to go back.
- Switch report type from the drop-down at the top-left without going back.

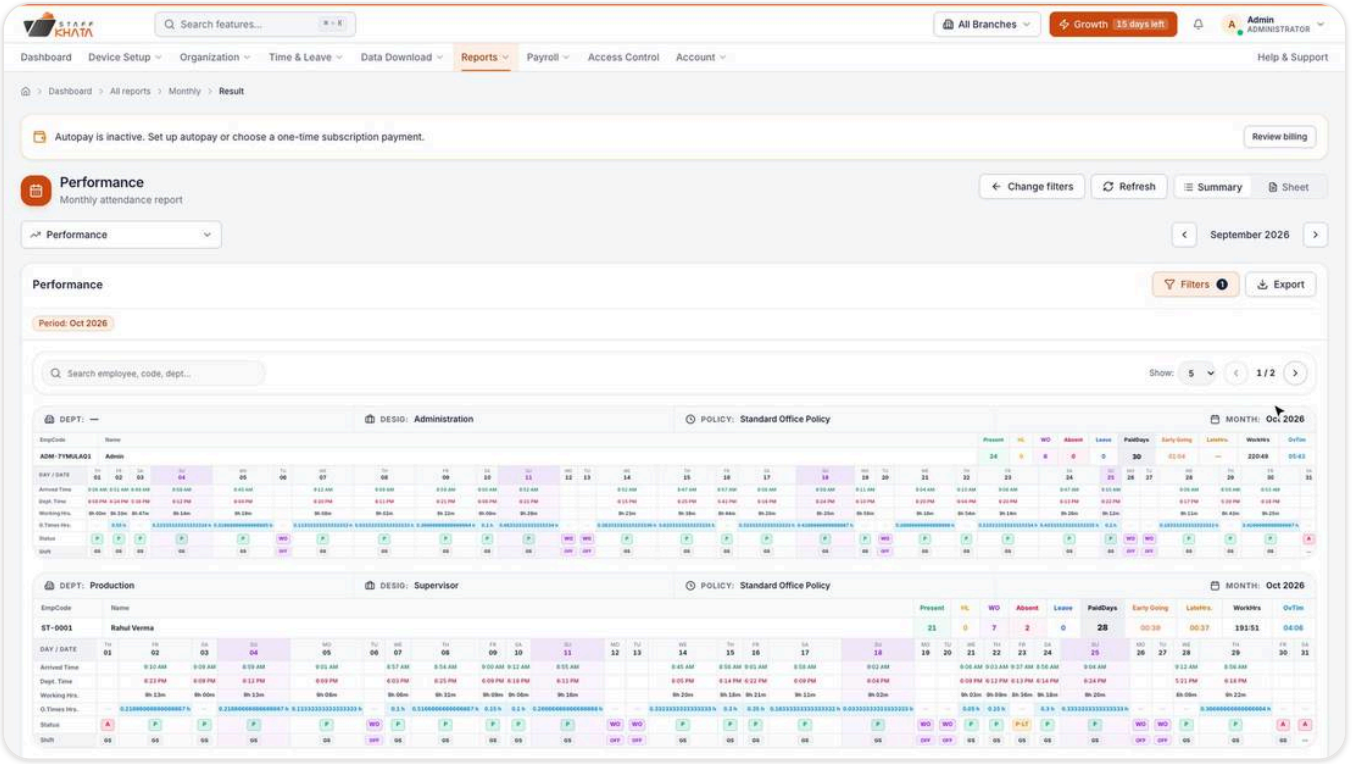


Weekly, Monthly and Yearly reports

These work the same way: choose the period, select who to include, and apply the filter.

1. Click **Reports → Monthly**.
2. Choose the month, select who to include, and click **Apply Filter**.
3. Change the report from the drop-down at the top. Useful ones:

Report	What it shows
Performance	Each employee's present days, holidays, weekly offs, absences, late hours and paid days, day by day.
Attendance With Status	Each person's month, one status per day.
Muster Book	A ready-made attendance register in the statutory format.
OT Summary	Overtime hours for the month.
Leave Details	Leave taken in the month.



Attendance Calendar

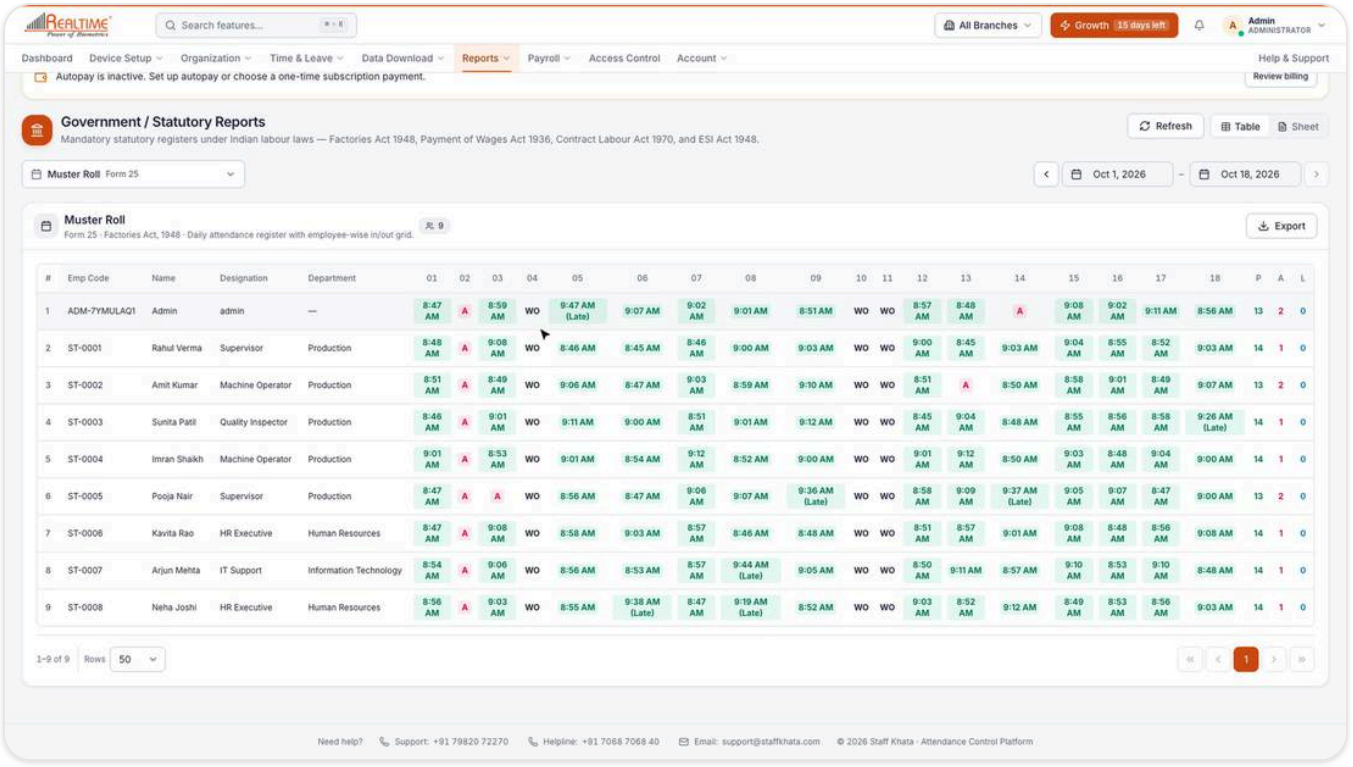
Click **Reports → Attendance Calendar** for the month as a calendar. Switch between **Cards**, **Matrix** and **Sheet** views, and filter by department or employee. It shows who came late, had absences or took leave.

Government Reports

1. Click **Reports → Government Reports**.
2. Change the dates at the top. Every register updates for that period.
3. Choose a register from the list.

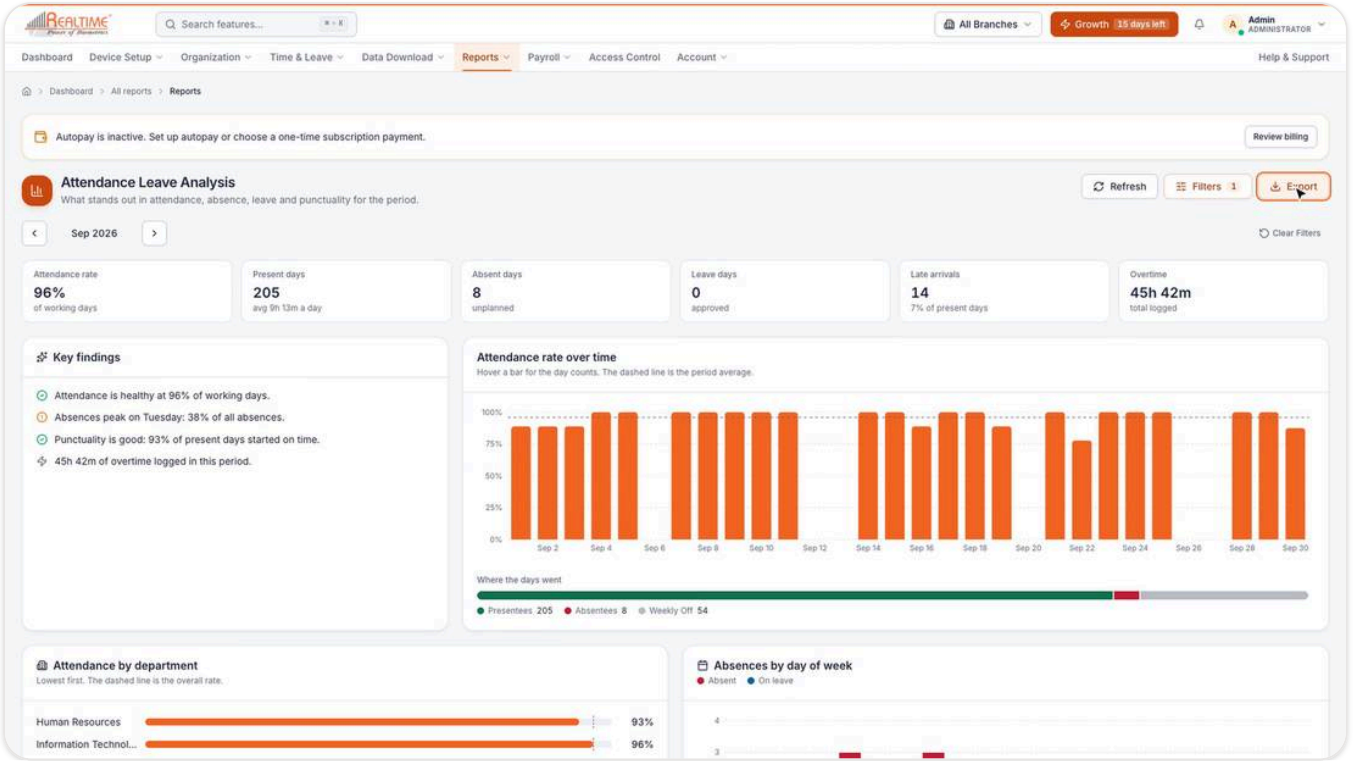
Register	Form	Law
Muster Roll	Form 25	Factories Act, 1948
Register of Adult Workers	Form B	Factories Act, 1948
Leave with Wages Register	Form D	Factories Act, 1948
Register of Wages	Form I	Payment of Wages Act, 1936
Register of Workmen	Form XIII	Contract Labour Act, 1970
ESI Register	Form 6	ESI Act, 1948

The Muster Roll shows in-times, absences, leave and weekly offs for every day of the period.



AI Analysis

Click **Reports → AI Analysis** to see what stands out in a period: your attendance rate, present and absent days, late arrivals and overtime. Below that are **Key findings** in plain language, a day-by-day chart, **Attendance by department**, and **Absences by day of week**.



> **Note:** AI Analysis also needs leave management on your plan.

Other reports

From **All reports** you can also open:

- **Late comers** and **Present / absent** for a date range.
- **Overtime** (needs overtime on your plan).
- **Manual attendance**, to review punches added by hand.
- **Leave report**, **Device punches** and **Easy access**.

Export, print and share

Click **Export** on any report and choose **Excel (.xlsx)**, **PDF (.pdf)** or **Sheet view / Print**. In Sheet view, use the **Excel**, **PDF** and **Print** buttons above the sheet.

13

WhatsApp alerts and integrations

Plan: All plans

Stay updated without opening the app. Staff Khata can send you attendance summaries on WhatsApp, send alerts to staff from your own WhatsApp or SMS account, and pass events to other software.

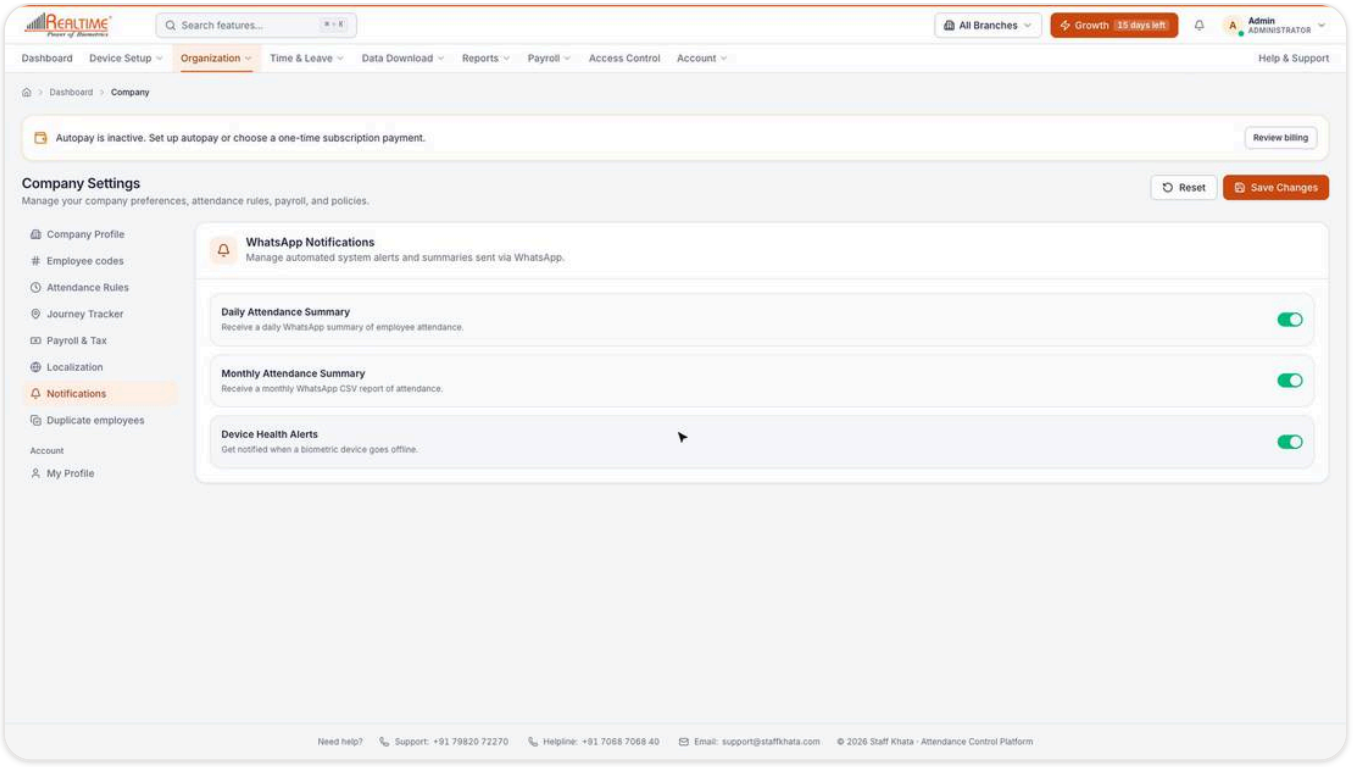
Choose your WhatsApp summaries

These messages come from Staff Khata to the owner's number. Nothing to set up beyond switching them on.

1. Click **Organization → Company**, then open the **Notifications** tab.
2. Under **WhatsApp Notifications**, switch on the messages you want:

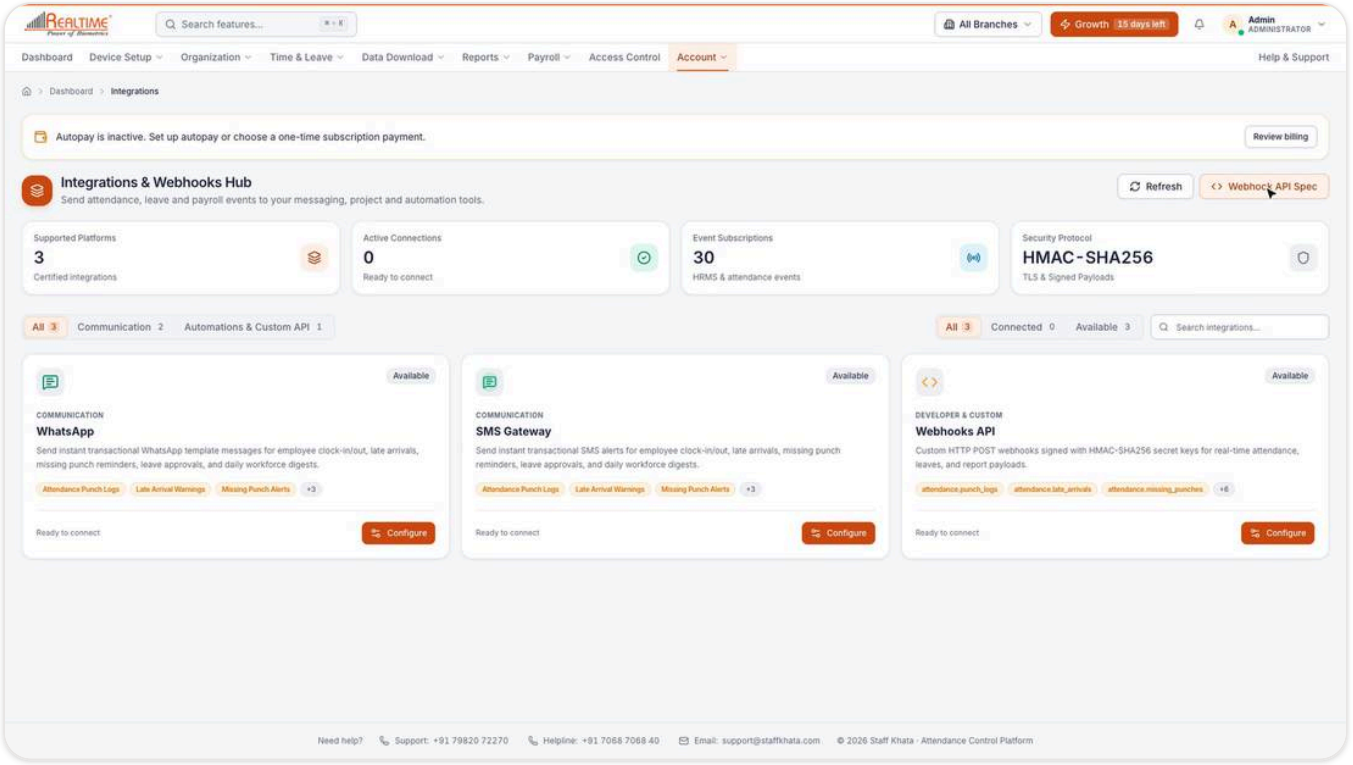
Setting	What you get
Daily Attendance Summary	A WhatsApp summary of the day's attendance every night.
Monthly Attendance Summary	A monthly attendance report as a CSV file.
Device Health Alerts	A message when a biometric device goes offline.

3. Click **Save Changes**.



Open the Integrations hub

To send alerts from your own accounts, click **Account** → **Integrations**. The **Integrations & Webhooks Hub** shows three ready-made connections: **WhatsApp**, **SMS Gateway** and **Webhooks API**. Click **Configure** on the one you want.

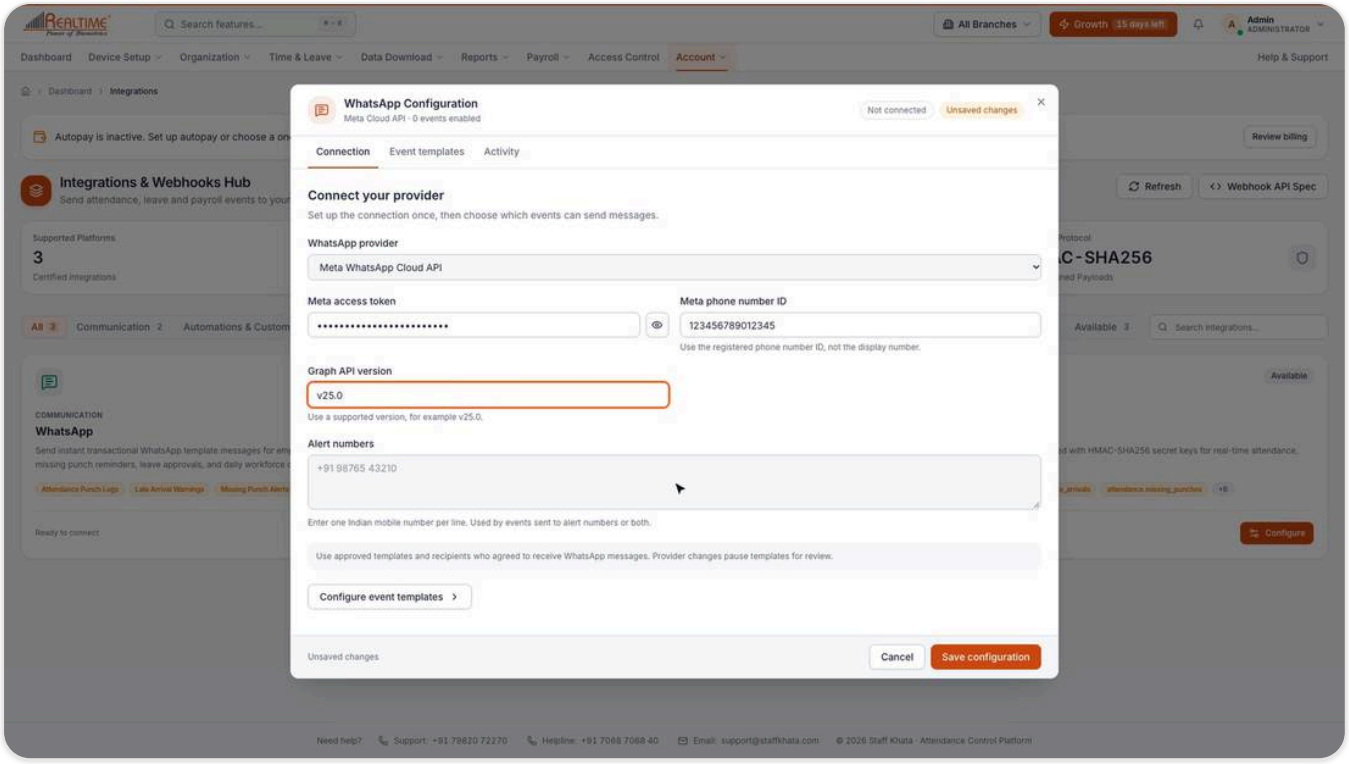


Use your own WhatsApp Business number

You need a WhatsApp Business account on Meta's Cloud API, with message templates already approved by Meta.

Connect

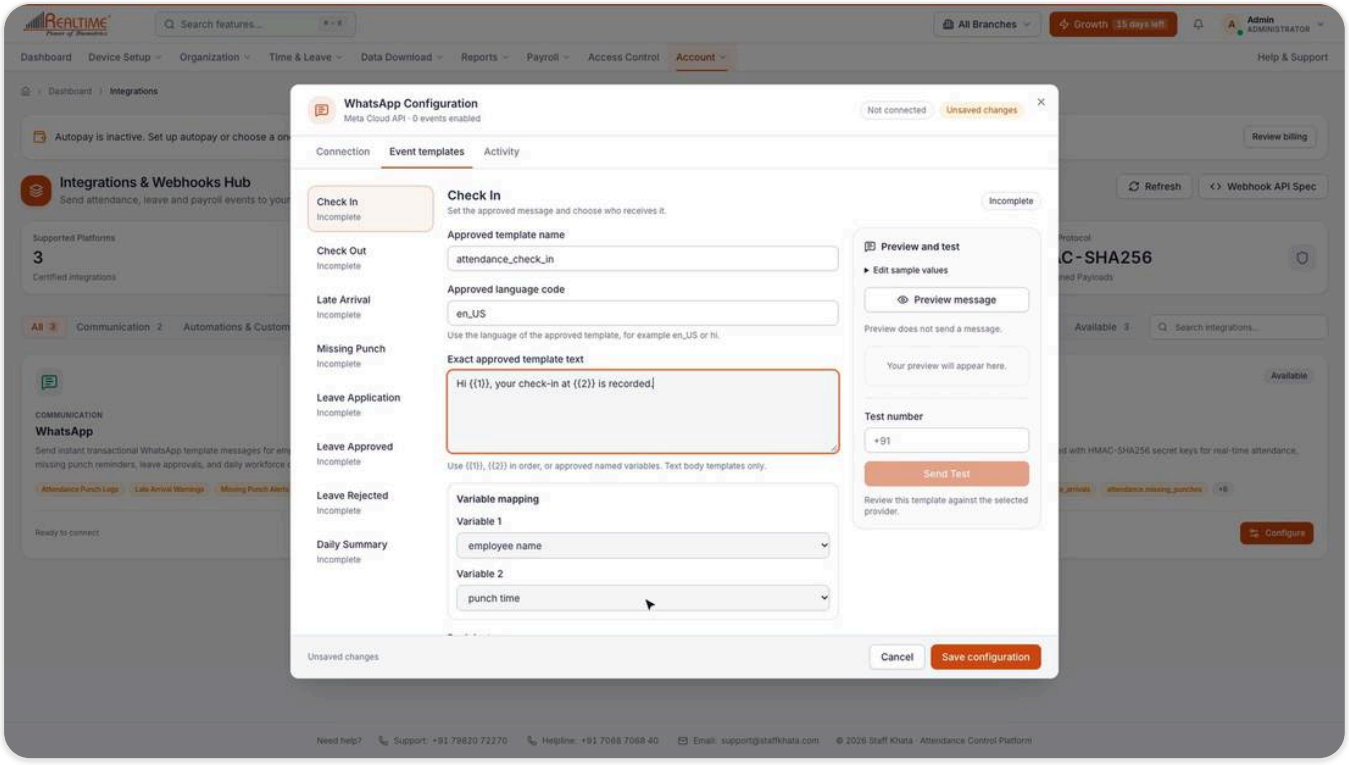
1. On the **WhatsApp** card, click **Configure**. The **Connection** tab opens.
2. Enter your **Meta access token** and **Meta phone number ID**. Use the phone number ID from Meta, not the phone number itself.
3. Under **Alert numbers**, enter the mobile numbers that should receive owner alerts (up to 20).



Set up event templates

1. Open the **Event templates** tab. Events are listed on the left: **Check In**, **Check Out**, **Late Arrival**, **Missing Punch**, **Leave Application**, **Leave Approved**, **Leave Rejected** and **Daily Summary**.
2. Pick an event, for example **Check In**.

3. Enter the **Approved template name**, the **Approved language code** (such as en_US or hi) and the **Exact approved template text**, copied exactly as Meta approved it.
4. Under **Variable mapping**, choose what fills each variable, for example **employee name** for Variable 1 and **punch time** for Variable 2.
5. Choose the **Recipients** and tick the box to confirm you checked the template against Meta.
6. Click **Preview message** to see exactly what will be sent. To try it, enter a **Test number** and click **Send Test**.
7. Switch on **Enable event**, then click **Save configuration**.



> **Note:** The **Missing Punch** message is sent once, 30 minutes after the shift ends, when only an in or out punch exists. The **Daily Summary** runs at 10 PM India time and goes to alert numbers only.

The **Activity** tab lists recent test and event messages and whether your provider accepted them.

> **Tip:** "Accepted" means Meta accepted the message. It does not confirm delivery. Check your Meta dashboard before resending.

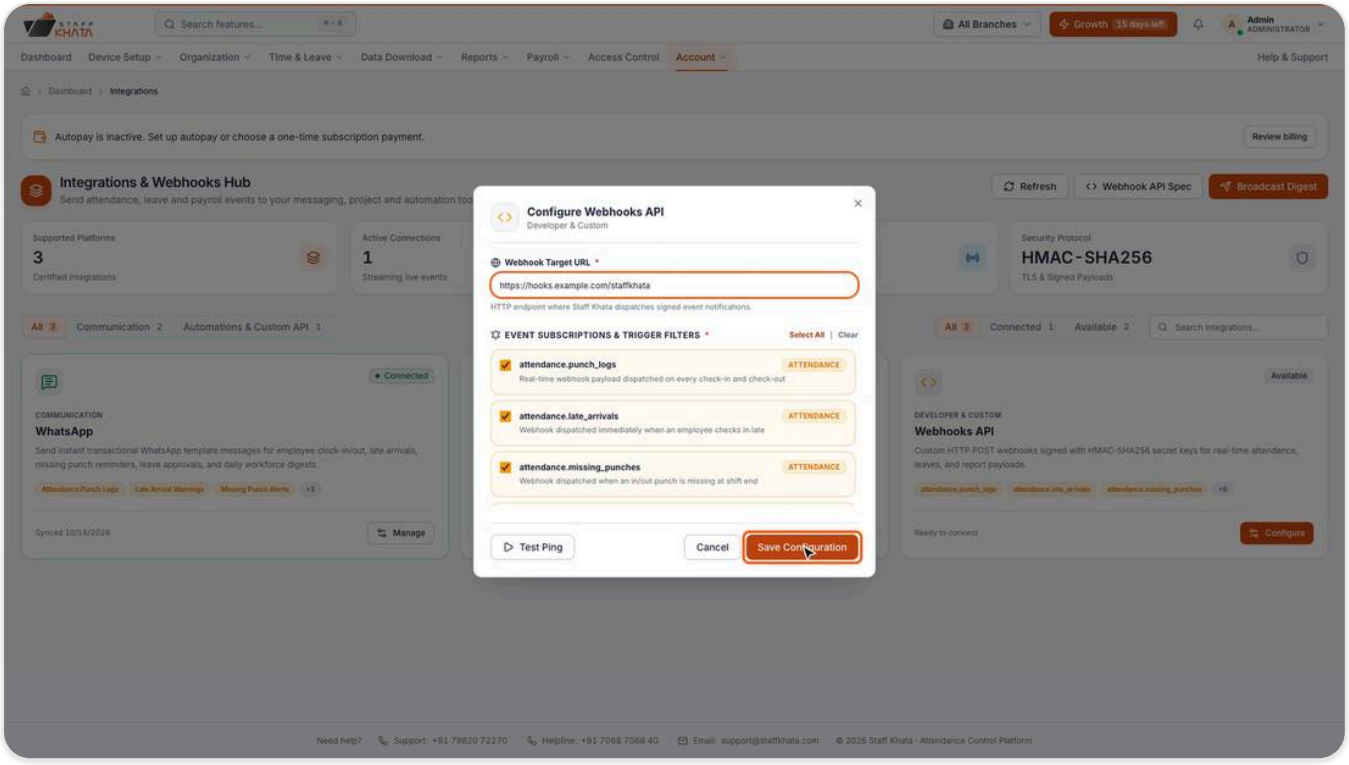
Send alerts by SMS

The **SMS Gateway** works the same way: click **Configure**, connect a provider, then set up event templates. You can choose **MSG91**, **Fast2SMS** or **Custom URL** for other providers. Indian SMS needs your DLT-approved sender ID, entity ID and template text, so keep them ready from your provider.

Send events to other software (webhooks)

Use webhooks if your own software or an automation tool should know when someone punches in, applies for leave, and so on.

1. On the **Webhooks API** card, click **Configure**.
2. Enter your **Webhook Target URL**.
3. Under **Event Subscriptions**, tick the events to send.
4. Click **Test Ping** to check the connection, then **Save Configuration**.



Every event is signed, so your system can check it really came from Staff Khata. Your developer can find the details under **Webhook API Spec**.

To stop a connection, open it and click **Disconnect**.

14

Employee self-service on web and mobile

Plan: Plans with employee login

With employee login, each employee gets their own Staff Khata account on the web and in the Staff Khata app for Android and iOS. They can check their attendance, fix wrong punches, apply for leave and see their payslips, so fewer questions come to you.

> **Plan needed:** Employee login can be locked on lower plans. See **Billing & Plan** for current plans.

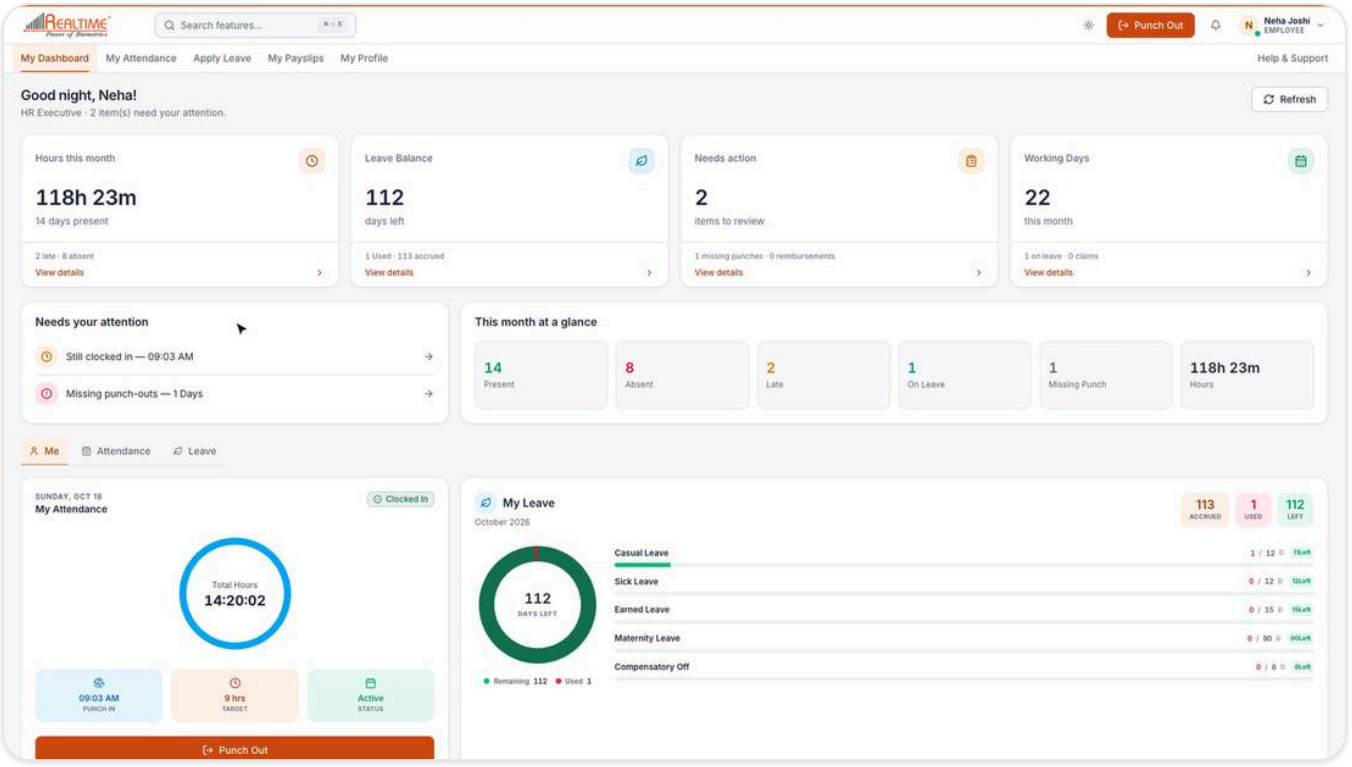
Give employees a login

1. Click **Organization** → **Employee List**.
2. Open the arrow next to **Add Employee** and click **Invite Employee**, or add the employee with their email and mobile number. See Add and manage employees.
3. To set or reset someone's password, open the row menu and click **Update Password**.
4. To let someone punch in from the Staff Khata app with a selfie, open the row menu and click **Enable Mobile Punch**.

Employees sign in at https://attendance.staffkhata.com or in the Staff Khata app with the same email and password.

My Dashboard

When an employee signs in, they land on **My Dashboard**. It shows their hours this month, leave balance, anything that needs their attention (such as a missed punch-out), and the working days so far. The tabs below break down their attendance and leave for the month.



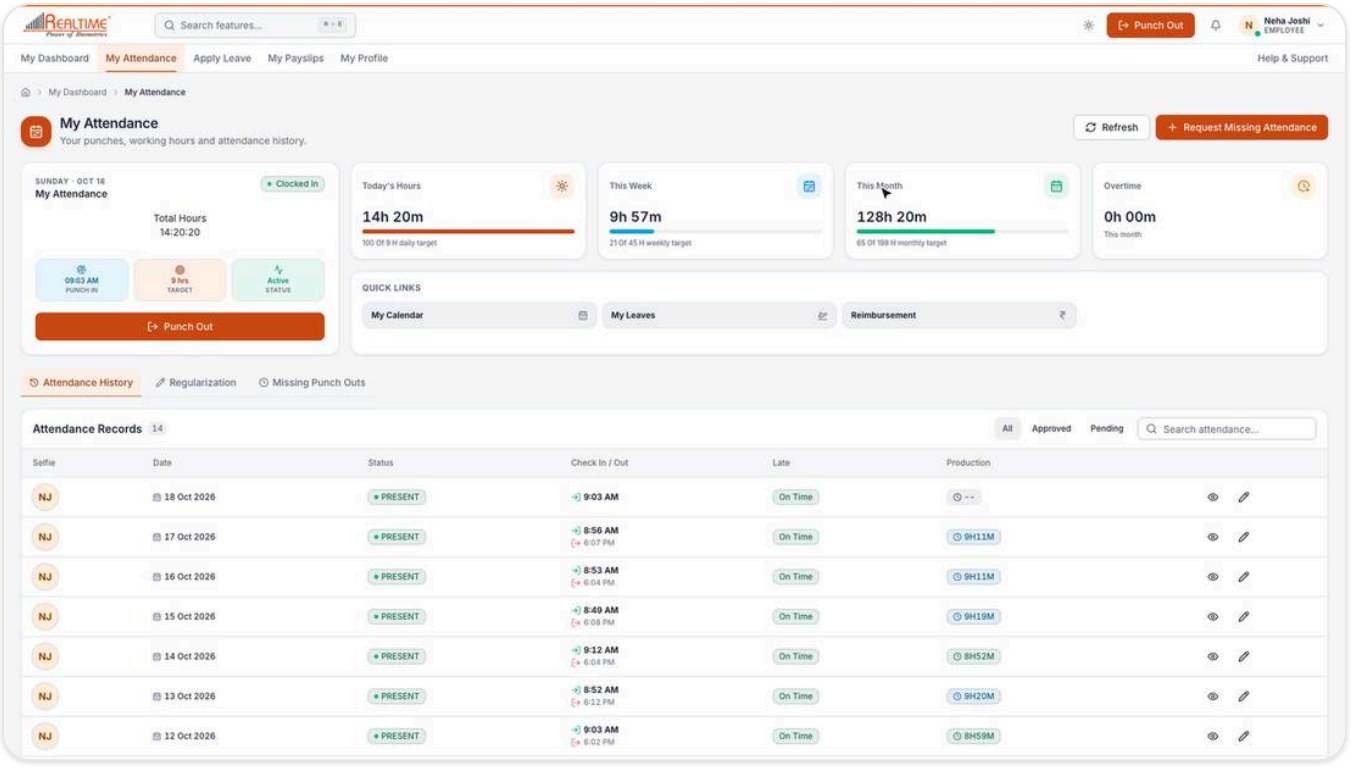
My Attendance

My Attendance shows today's hours, this week, this month and any overtime.

Punch in from the browser

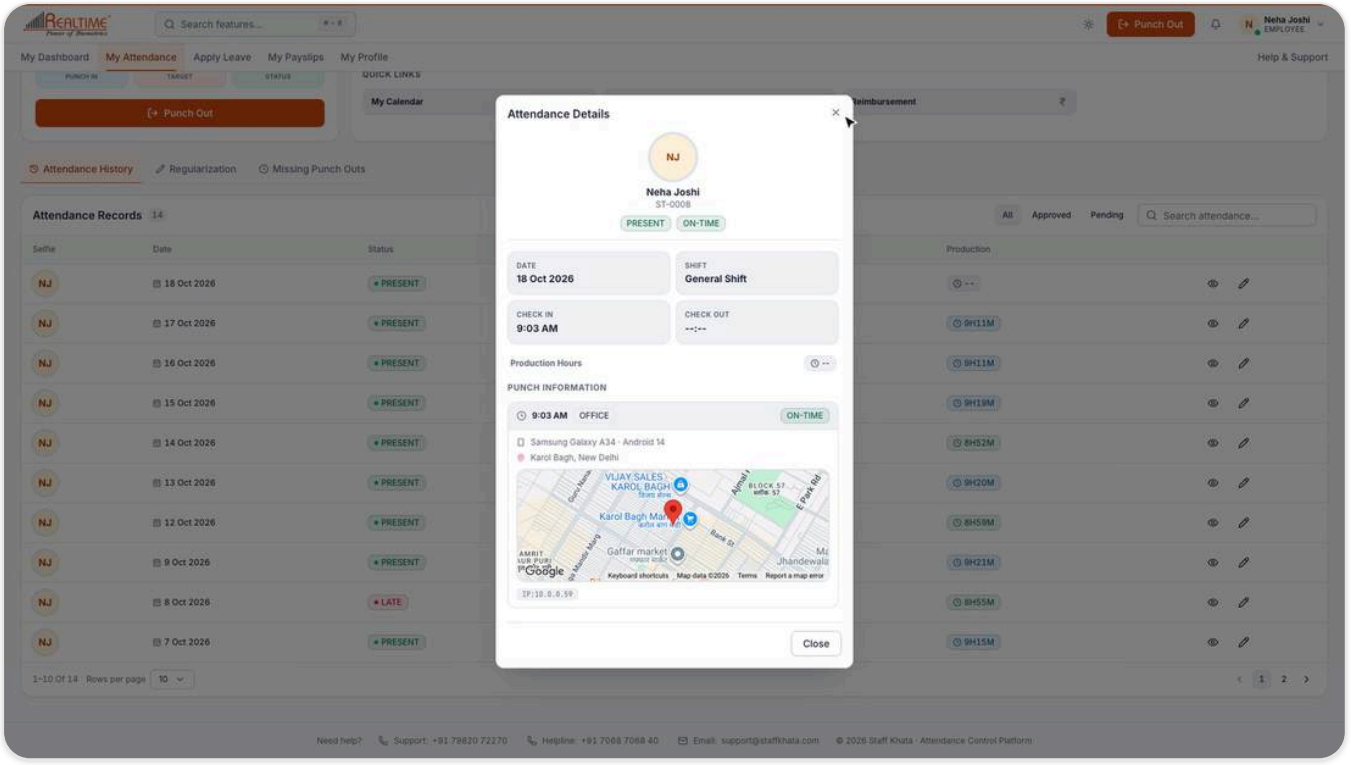
1. Click **Punch In** (top right or on the page).
2. Allow the camera and location when the browser asks.
3. Take a selfie and confirm.

The punch is saved with the selfie and location. Click **Punch Out** at the end of the day.



See history

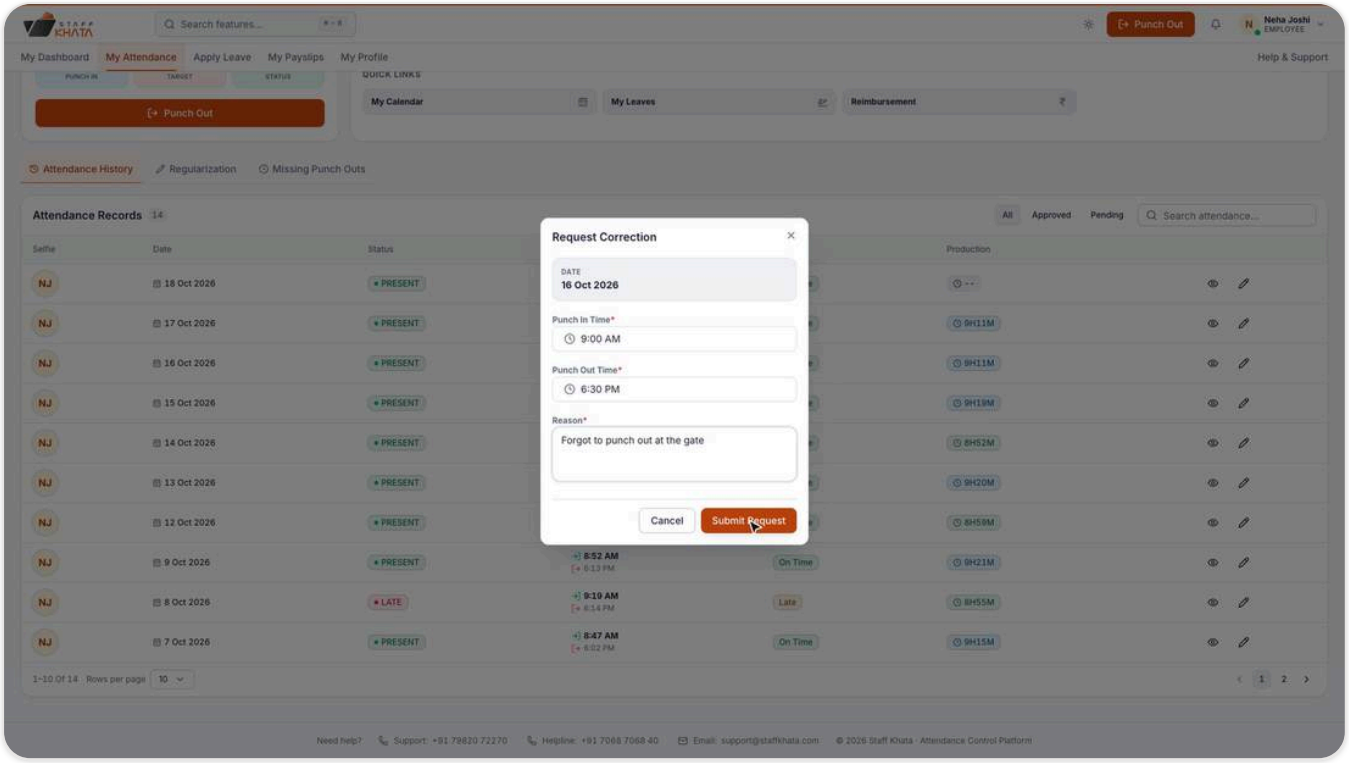
The **Attendance History** tab lists every day. Click the eye icon on a day to see the punch times, the device used, and the location on a map.



Correct a wrong punch

1. Click the edit icon on the day.
2. In **Request Correction**, set the **Punch In Time** and **Punch Out Time**.
3. Enter a **Reason** and click **Submit Request**.

The request goes to you for approval. Employees track it on the **Regularization** tab. Days with no punch-out are listed under **Missing Punch Outs**, and **Request Missing Attendance** covers days with no punch at all.

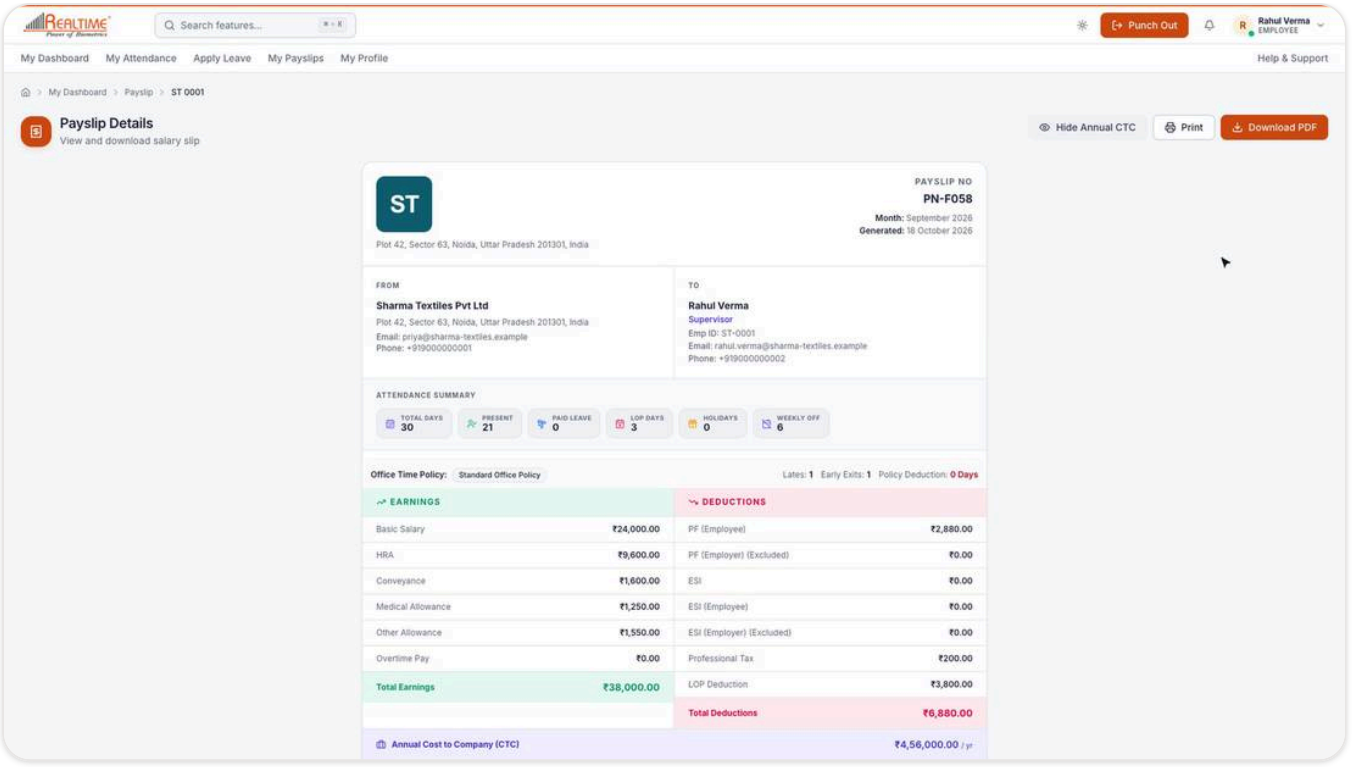


Apply Leave

Under **Apply Leave**, employees see their leave balances and the status of every request. They click **Apply Leave**, choose the **Leave Type**, the dates (or **Half Day**), add a reason and submit. You approve or reject it as usual.

My Payslips

Under **My Payslips**, the employee picks the month and year to see every salary paid, with earnings, deductions and days worked. Click **View** to open the full payslip with attendance, earnings, deductions and net pay in words, and download it as a PDF.



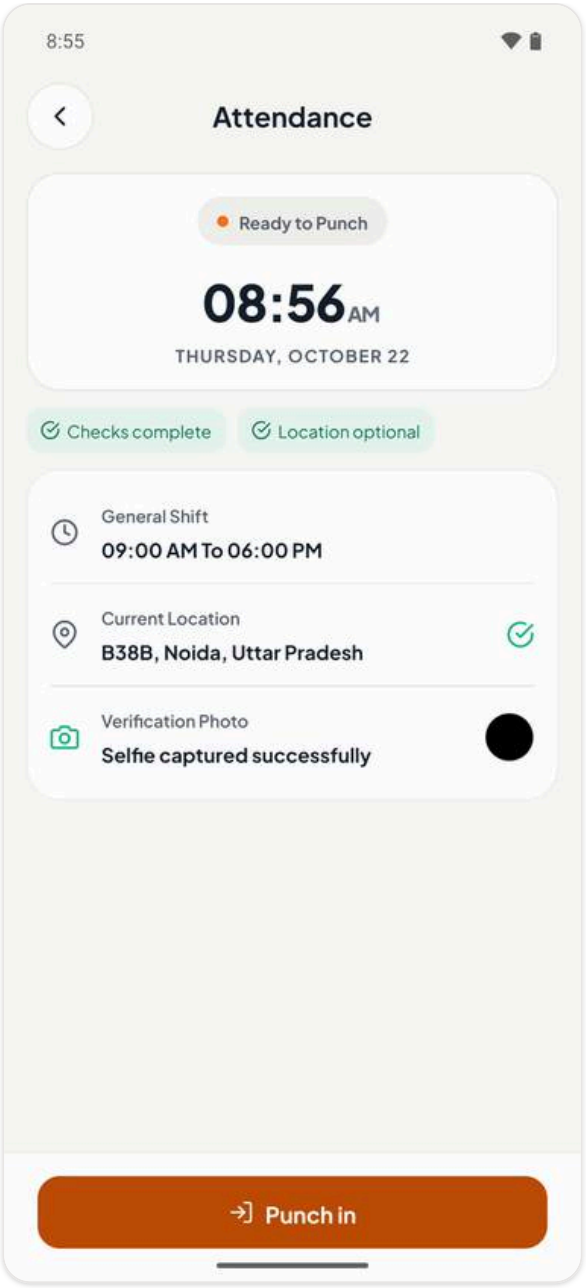
My Profile

My Profile shows personal details, career history and bank information in one place.

On the Staff Khata app

The mobile app gives employees the same features in their pocket:

- **Mark Attendance**: punch in and out with a selfie and location. If mobile punching is switched off for them, they use their assigned Realtime biometric device instead.
- **Attendance**: a calendar of the month. Tap a day to see the punch timeline and check-in location, and tap **Request Regularisation** to fix it.
- **Leave**: apply for a full day, half day or date range, and see request status.
- **Payslip**: view any month and tap **Download PDF**.
- **Claims & Reimbursement**: send an advance or expense claim with a photo or PDF of the bill. It arrives in **Advances & Reimbursements** for you to approve.
- **Profile**: personal and job details.



Tip: If geo-fencing is on, employees can only punch from the app when they are inside the allowed area. See Attendance rules and office time policy.

15

Journey Tracker (add-on)

Plan: Journey Tracker add-on

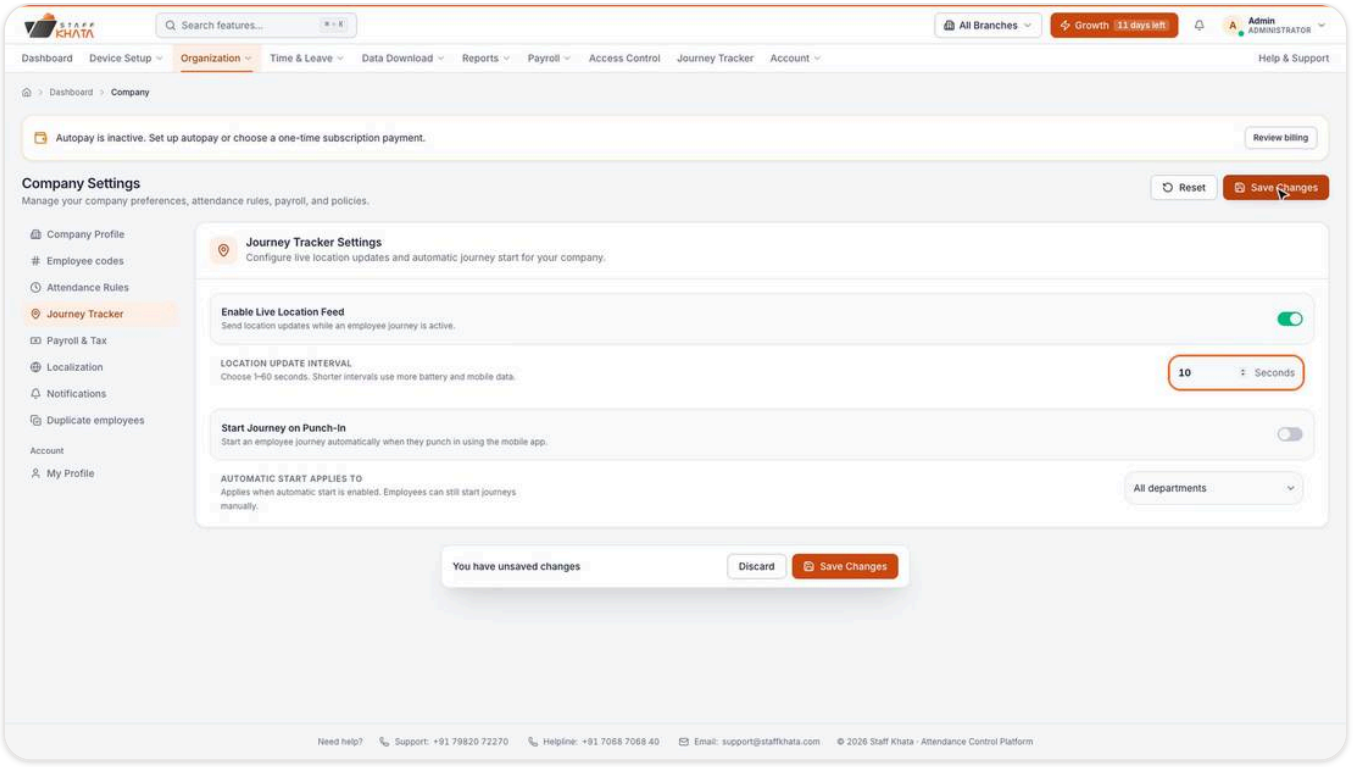
Journey Tracker is for staff who work on the road: sales visits, deliveries, service calls. Employees record their trips on the Staff Khata mobile app, and you see where they are, where they stopped and what they spent, from the web app.

> **Plan needed:** Journey Tracker is a paid add-on. The **Journey Tracker** menu and settings tab appear only once the add-on is active on your account. See **Billing & Plan** for current prices.

Turn on Journey Tracker

Set how often phones send their location before your team starts using it.

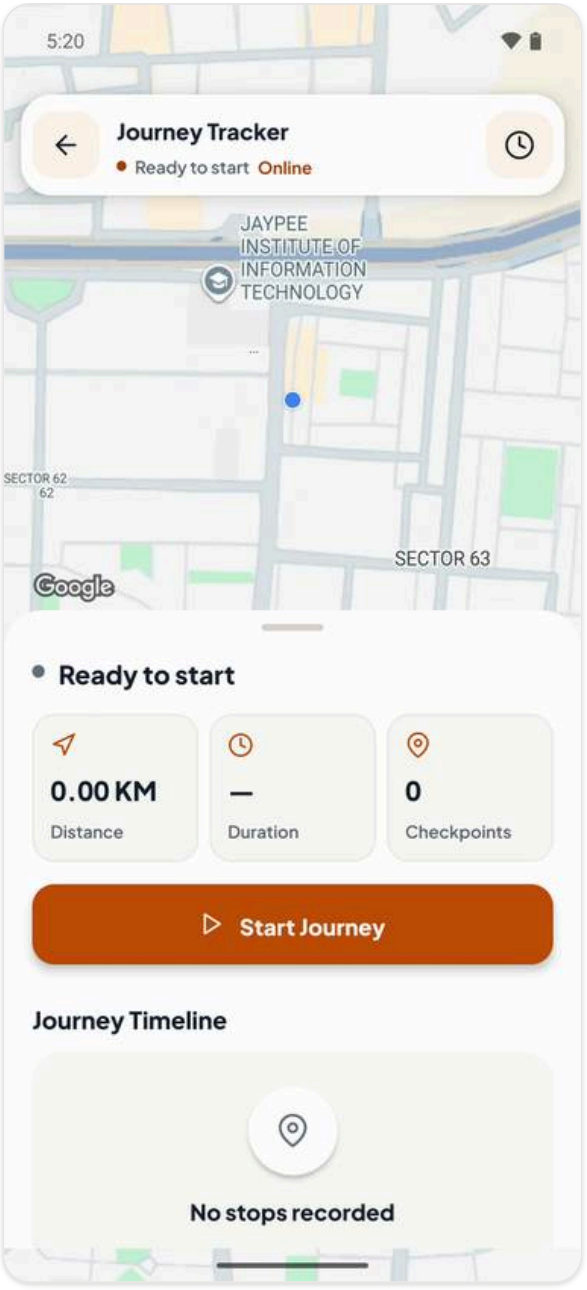
1. Click **Organization** → **Company**.
2. In **Company Settings**, open the **Journey Tracker** tab.
3. Switch on **Enable Live Location Feed**.
4. Enter the **Location Update Interval** in seconds. Ten seconds works well for most teams.
5. Click **Save Changes**. You will see "Journey settings saved".



Setting	What it does
Enable Live Location Feed	Sends location updates while an employee's journey is running.
Location Update Interval	How often the phone sends its location, from 1 to 60 seconds. Shorter intervals use more battery and mobile data.
Start Journey on Punch-In	Starts a journey automatically when the employee punches in on the mobile app.
Automatic Start Applies To	**All departments**, or **Selected departments** only. Employees can still start journeys by hand.

Start a journey (employee, mobile app)

1. On the **Home** screen of the Staff Khata app, tap **Journeys**. You can also go to **More** → **Journey Tracker**.
2. Tap **Start Journey**, then **Done** on the confirmation.



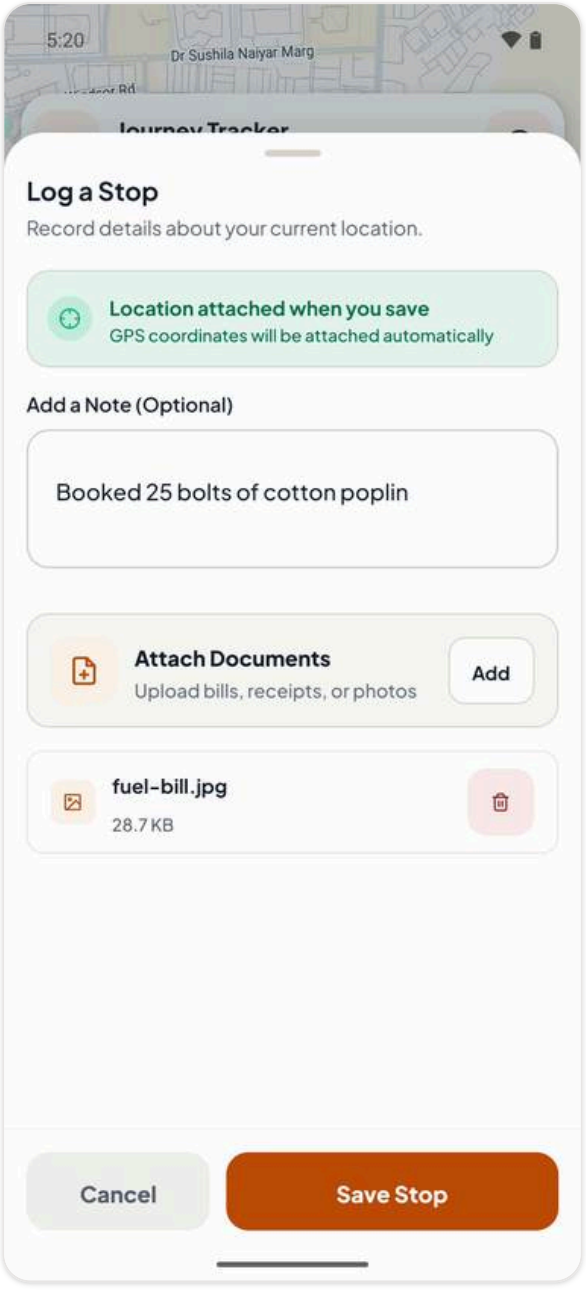
The screen now shows **On Trip** with the distance, duration and checkpoints so far. The phone keeps sending its location while the app is in the background.

> **Tip:** If the app warns "Battery optimization is on — tracking may stop", tap **Fix** and allow it. Some phones stop background apps to save battery, which leaves gaps in the route.

Add a checkpoint at a customer

A checkpoint records a stop: where it was, what happened and any bills.

1. On the trip screen, tap **Add Checkpoint**. The **Log a Stop** sheet opens. Your location is attached automatically.
2. Under **Add a Note (Optional)**, write what happened, for example the order you booked.
3. Tap **Attach Documents** to add bills, receipts or photos. Choose **Take Photo** or **Browse Files**.
4. Tap **Save Stop**.



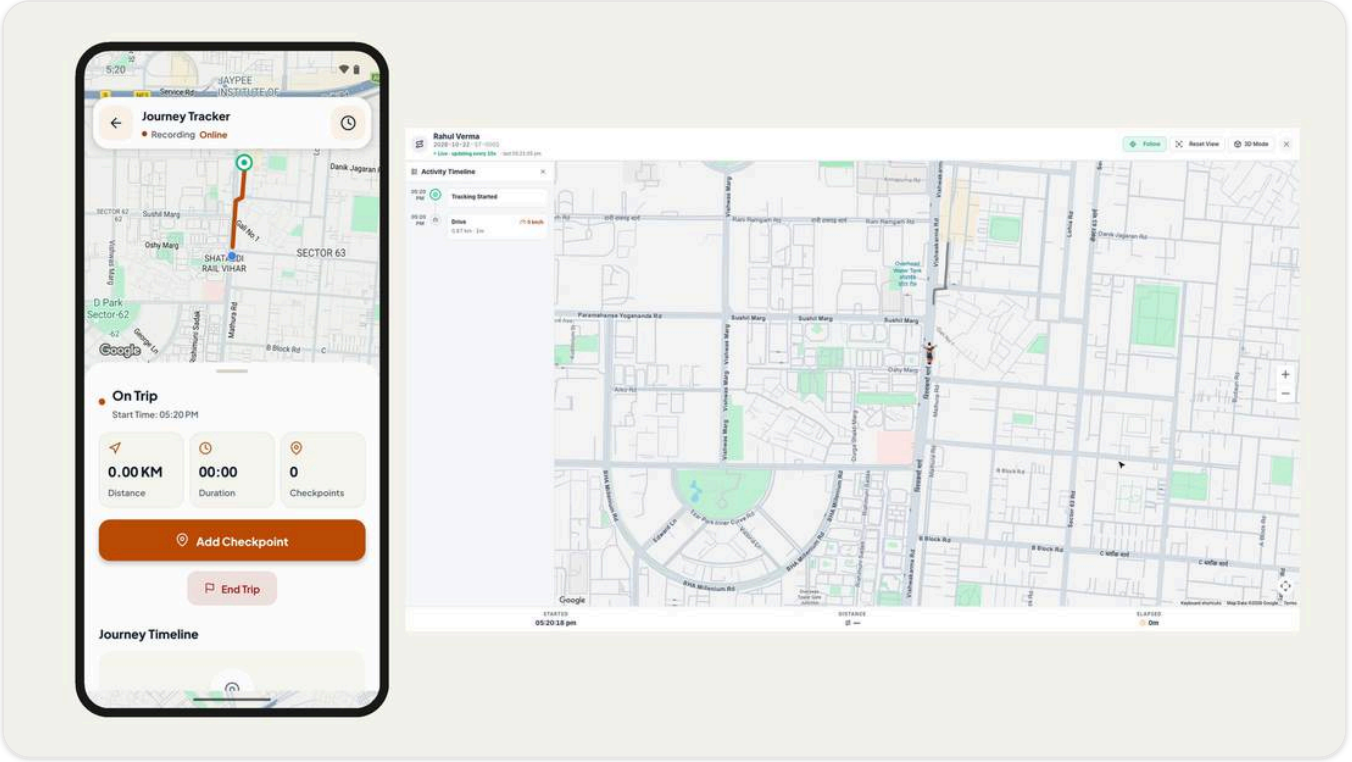
End the journey

1. When the work is done, tap **End Trip**.
2. Confirm with **End trip**. You can't resume a journey after ending it.

The journey closes with its route, total distance and every stop. Employees can see past trips under **More** → **Journey History**.

Watch your team live (admin)

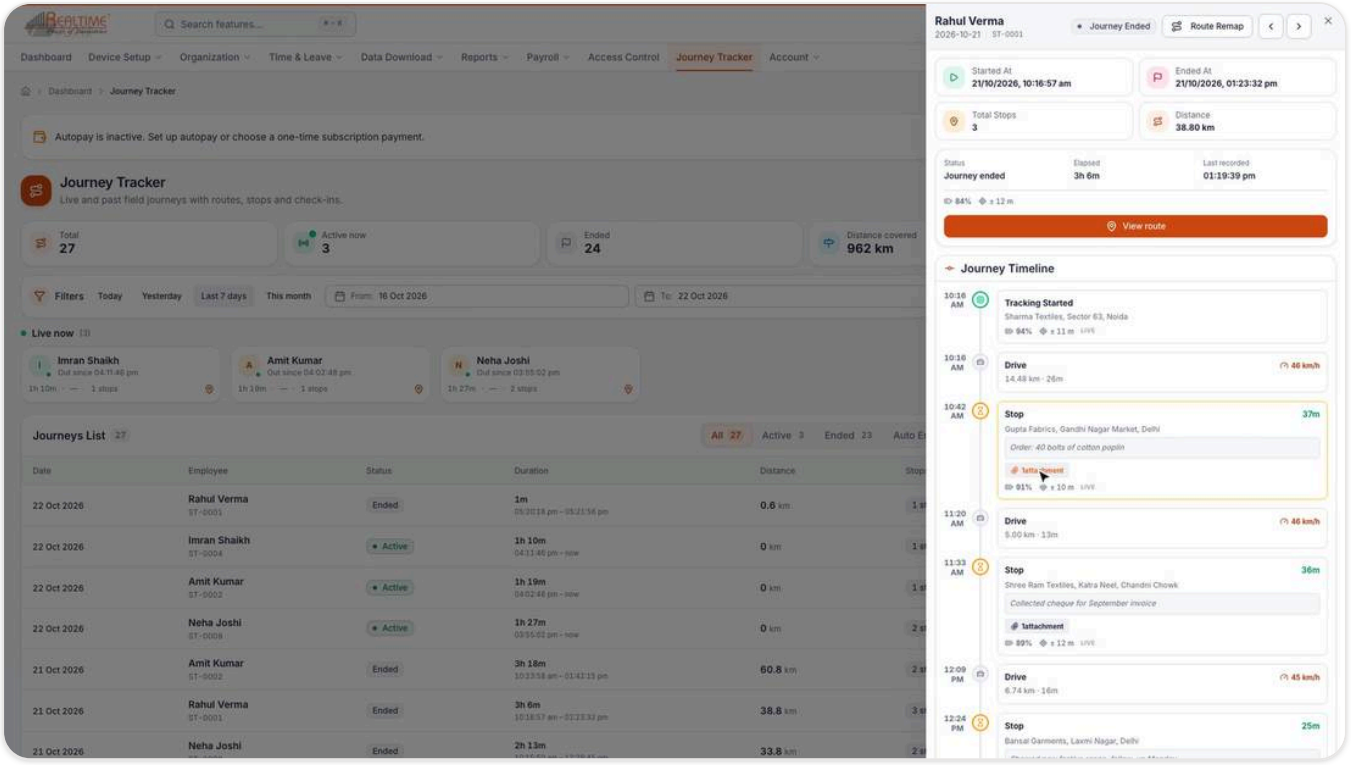
1. Click **Journey Tracker** in the top menu.
2. Click **Refresh**. Everyone on a trip appears under **Live now**.
3. In the **Journeys List**, click the map icon on an active journey to open its live map. The map follows the employee as new locations arrive, with an **Activity Timeline** on the left.



To see everyone at once, click **Live Locations** at the top right. It shows every employee on a trip on one map.

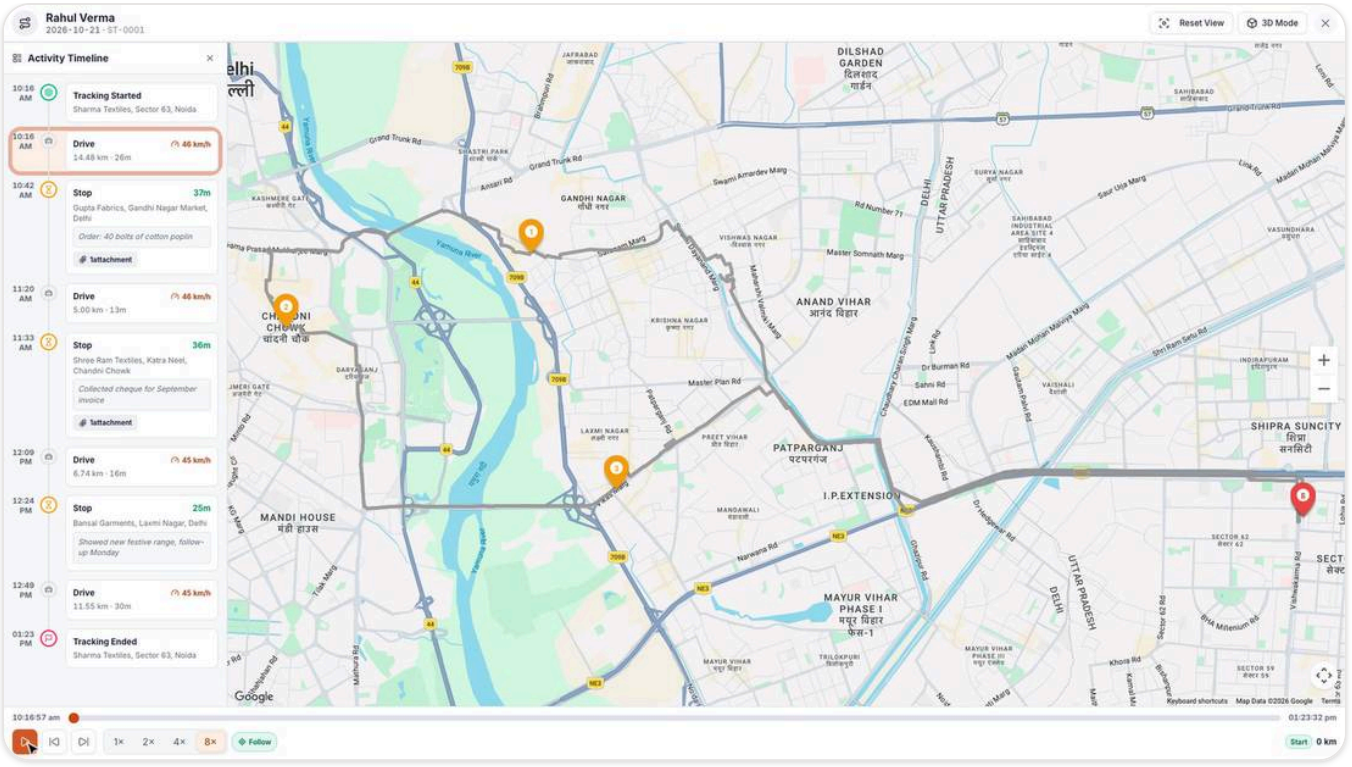
Review journey history

1. Under **Filters**, pick **Today**, **Yesterday**, **Last 7 days** or **This month**, or set your own **From** and **To** dates. You can also pick one employee.
2. The cards at the top show **Total** journeys, **Active now**, **Ended**, **Distance covered** and **Avg. duration**.
3. Use the **All**, **Active**, **Ended** and **Auto Ended** tabs to filter the list, and **Export** to download it.
4. Click the eye icon on any journey. The panel shows start and end time, total stops, distance and the **Journey Timeline**: every drive and every stop with how long it lasted. Checkpoints show the employee's note, and you can click **attachment** to open the bills.



Replay a route

1. In the journey panel, click **View route**. The whole trip is drawn on the map with each stop numbered.
2. Press play to replay the day. Choose **1×**, **2×**, **4×** or **8×** speed.
3. Click **3D Mode** for a closer look at the streets, and **Satellite** for the satellite view. **Reset View** brings the map back.



Note: If someone forgets to end a trip, you can end it from the journey panel. Journeys left running may also close on their own and show as **Auto Ended**.

16

Pro HRMS (add-on)

Plan: Pro HRMS add-on

Pro HRMS adds the HR tools you need beyond attendance: a company feed, your reporting structure, referrals, asset tracking, policies and a support desk. It also adds the Manager role, so team leads can look after their own people.

> **Plan needed:** Pro HRMS is a paid add-on. Its menus appear only once it is active on your account. See **Billing & Plan** for current prices.

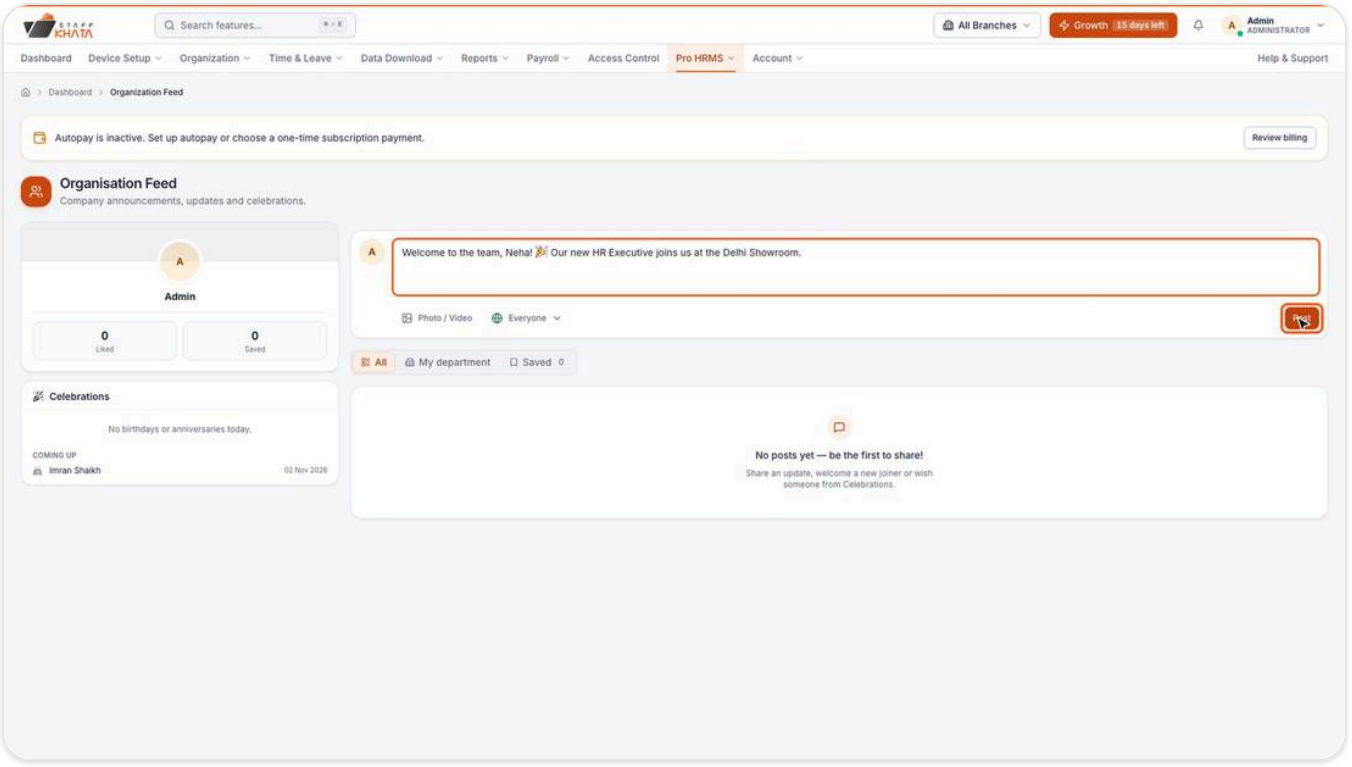
Find the Pro HRMS menu

Once the add-on is active, a **Pro HRMS** menu appears in the top bar for admins and managers, and in the employee panel. Everything below lives in that menu.

Organisation Feed

A shared wall for announcements, welcomes and celebrations.

1. Click **Pro HRMS** → **Organization Feed**.
2. Type in the post box. Click **Photo / Video** to attach media.
3. Choose who sees it: **Everyone** or **Specific Department**.
4. Click **Post**.

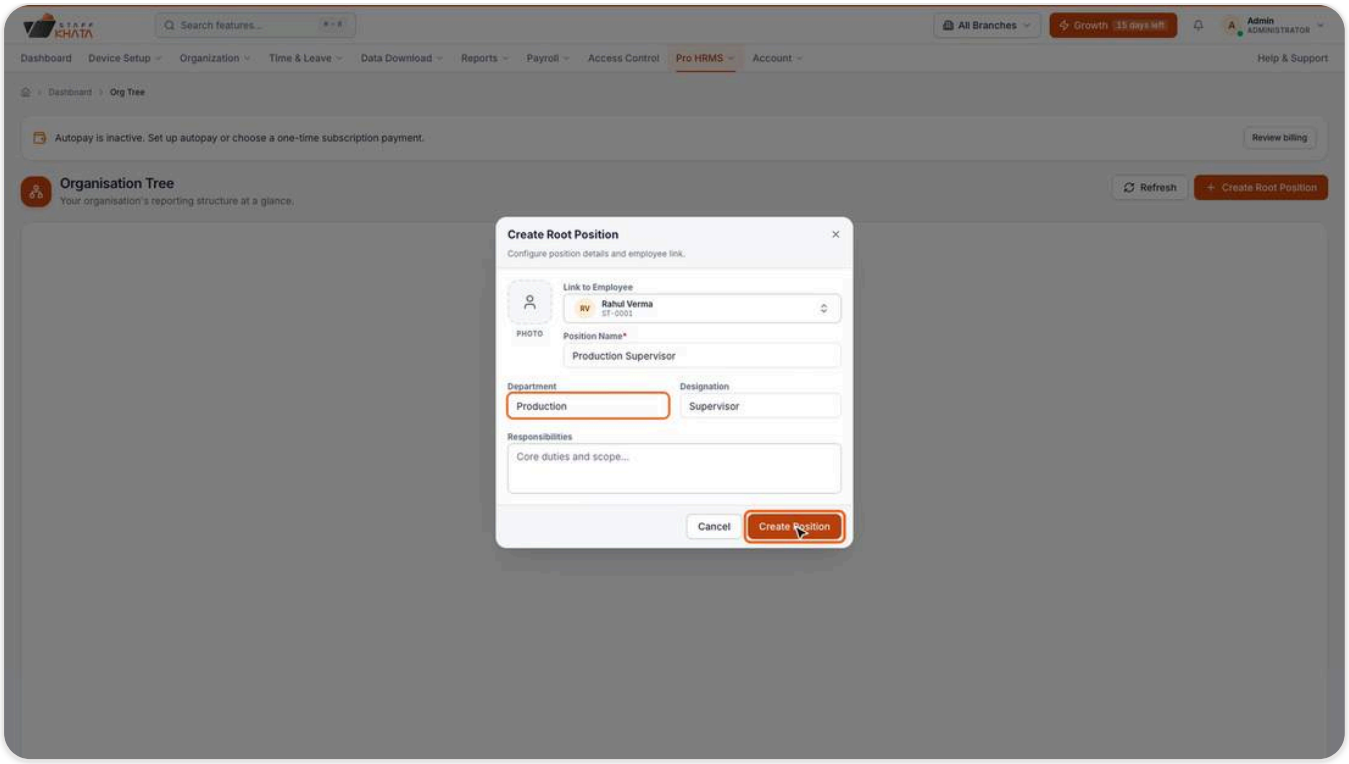


Employees can like, comment and save posts. The **Celebrations** card shows today's and upcoming birthdays and work anniversaries.

Org Tree

The Org Tree shows who reports to whom.

1. Click **Pro HRMS → Org Tree**.
2. Click **Create First Position** (later, **Create Root Position**).
3. Pick the employee under **Link to Employee**, then fill in **Position Name**, **Department** and **Designation**. **Responsibilities** and a photo are optional.
4. Click **Create Position**. Use **Add Direct Report** on a position to build the tree downwards.



A position can stay vacant until you hire for it. Employees see the tree under **My Org Tree**.

Job Referrals

1. Click **Pro HRMS → Job Referrals → Add Job Opening**.
2. Enter the **Job Title**, **Description**, **Location** and **Department**, then save.

Employees see open positions on their **Job Referrals** page and click **Refer Now** to put forward someone they know. You review candidates under **View Referrals** and move each one to **Pending**, **Hired** or **Rejected**.

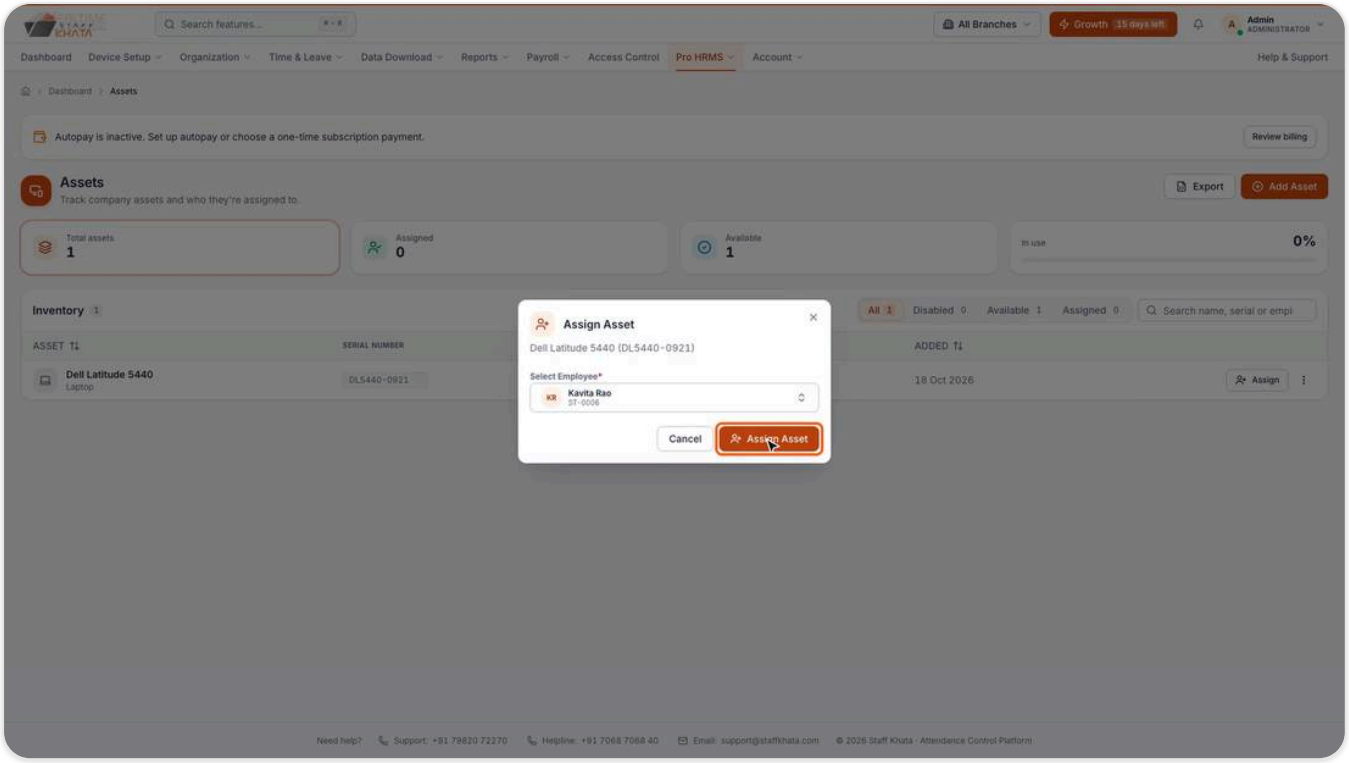
Daily Work Updates

Employees click **Submit Today's Work Update** and describe what they worked on. Admins and managers see everyone's updates under **Pro HRMS → Daily Work Updates**, filtered by date or employee, and can **Export** them.

Assets

Keep track of company laptops, phones and other property.

1. Click **Pro HRMS → Assets → Add Asset**.
2. Pick a type (for example **Laptop**), enter the **Asset Name** and **Serial Number**, and save.
3. In the **Inventory** list, click **Assign** on the asset, choose the employee under **Select Employee**, and click **Assign Asset**.



Each asset keeps an **Assignment History**. Employees see what they hold under **My Assets**.

Policy Documents

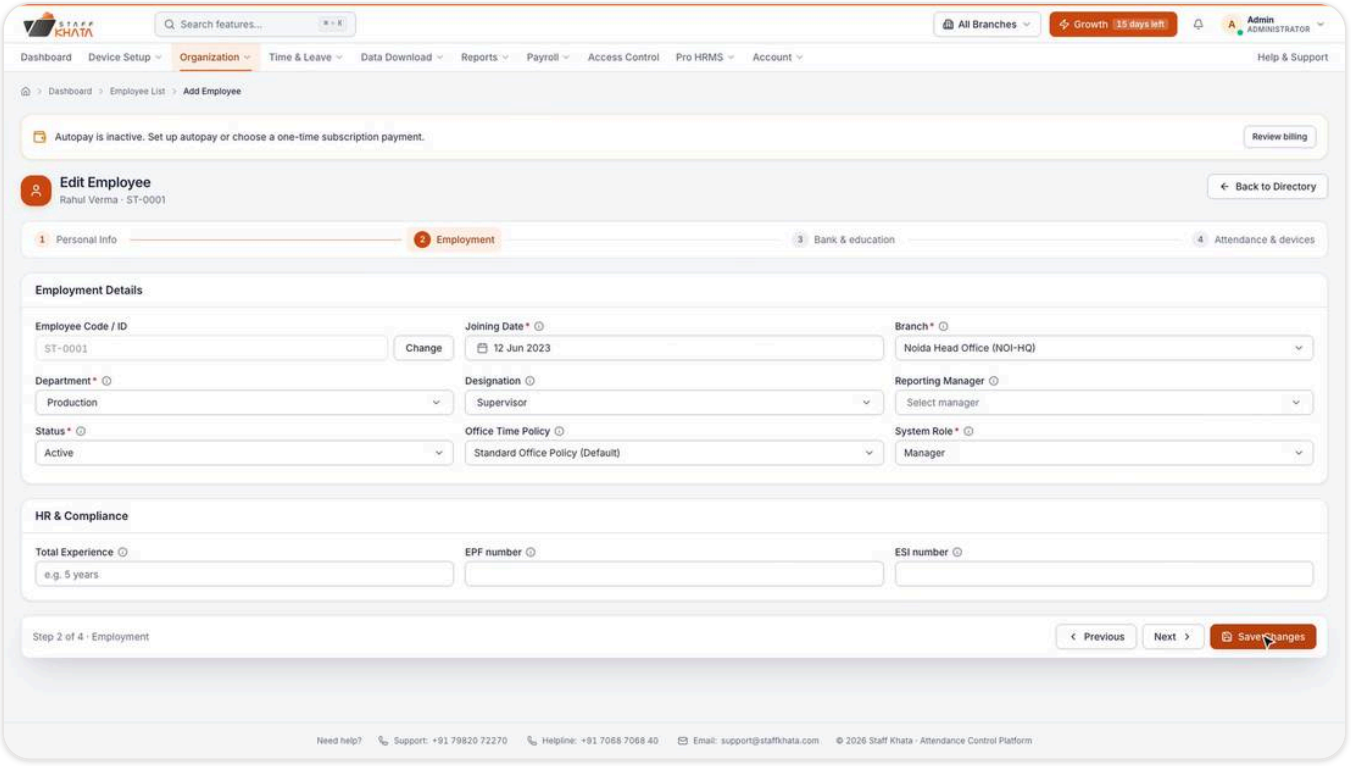
Click **Pro HRMS → Policy Documents → Upload Document**. Enter the **Policy Name** and **Policy Category**, and choose a file (PDF, Word, Excel, PowerPoint or image, up to 2 MB). Employees open the policy and click **Acknowledge**, and you can see who has acknowledged it.

HR Support

A help desk for questions about attendance, leave, payroll and other HR matters. Employees click **Raise Ticket**, add a subject, description and up to 5 files. HR and admins see all tickets under **Pro HRMS → HR Support** and move them through **Open**, **In Progress**, **Resolved** and **Closed** with **Update Status**.

Make someone a manager

1. Click **Organization → Employee List** and edit the employee.
2. Open the **Employment** step and set **System Role** to **Manager**.
3. Click **Save Changes**.



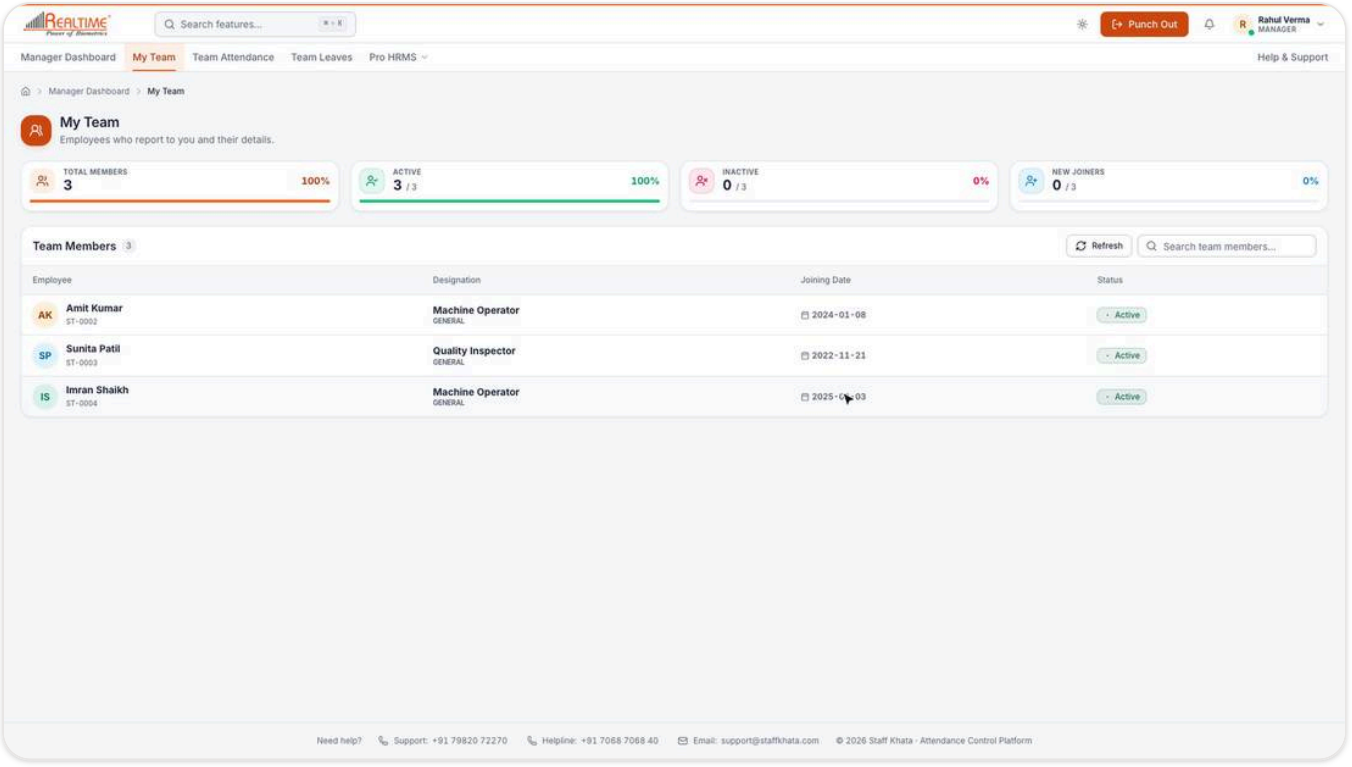
A manager's team is everyone whose **Reporting Manager** is that person. Set it on each team member's **Employment** step.

> **Note:** The **Manager** option in **System Role** appears only when Pro HRMS is active.

The manager panel

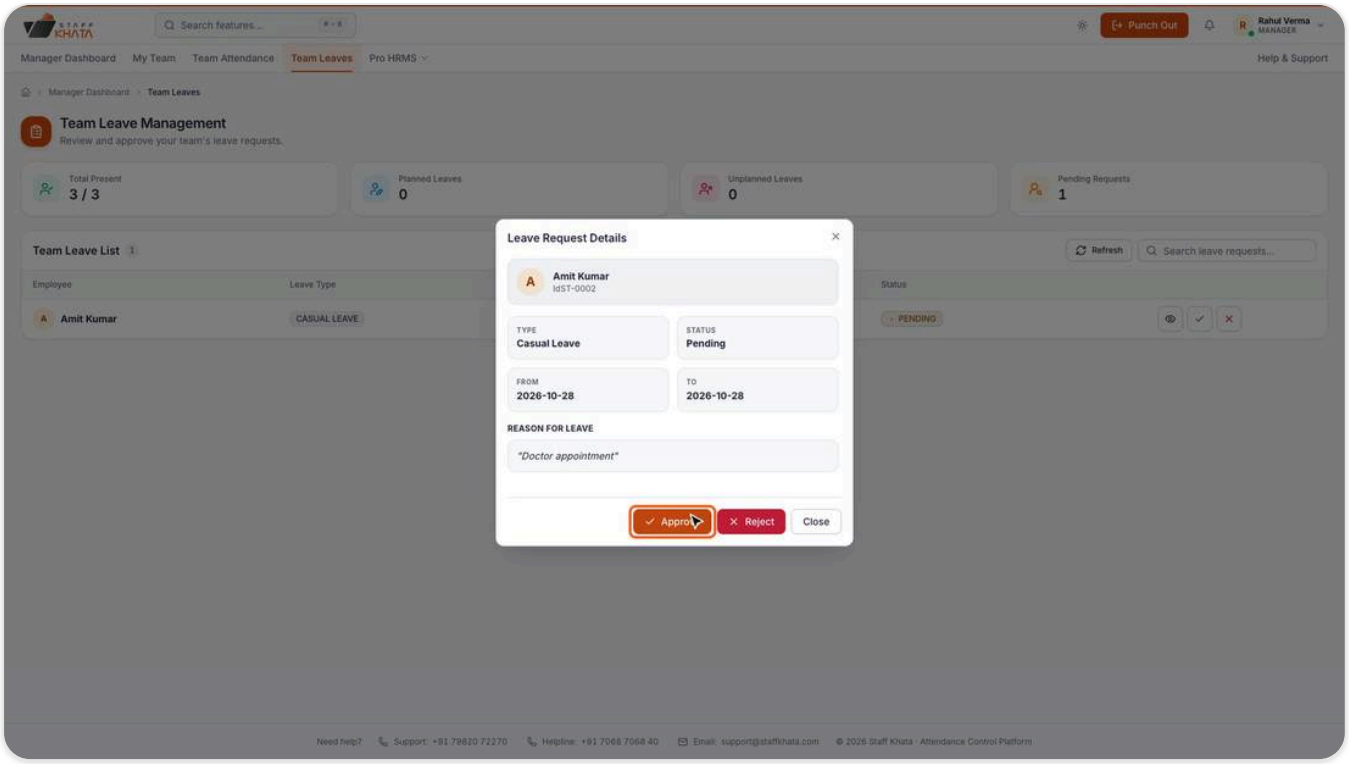
When a manager signs in, they land on the **Manager Dashboard**. The menu has:

Page	What managers do there
My Team	See everyone who reports to them, with designation, joining date and status.
Team Attendance	Check the team's daily attendance and punches, and review attendance correction requests.
Team Leaves	Review the team's leave requests and approve or reject them.



Approve a leave request

1. Click **Team Leaves**.
2. Click the eye icon on a request to open **Leave Request Details**.
3. Click **Approve**, or **Reject** with a reason.



A leave needs both the manager and HR to approve it. After the manager approves, the request shows "Approval Pending from HR" until HR gives the final approval. If either one rejects it, the leave is rejected.

17

Plans, billing and support

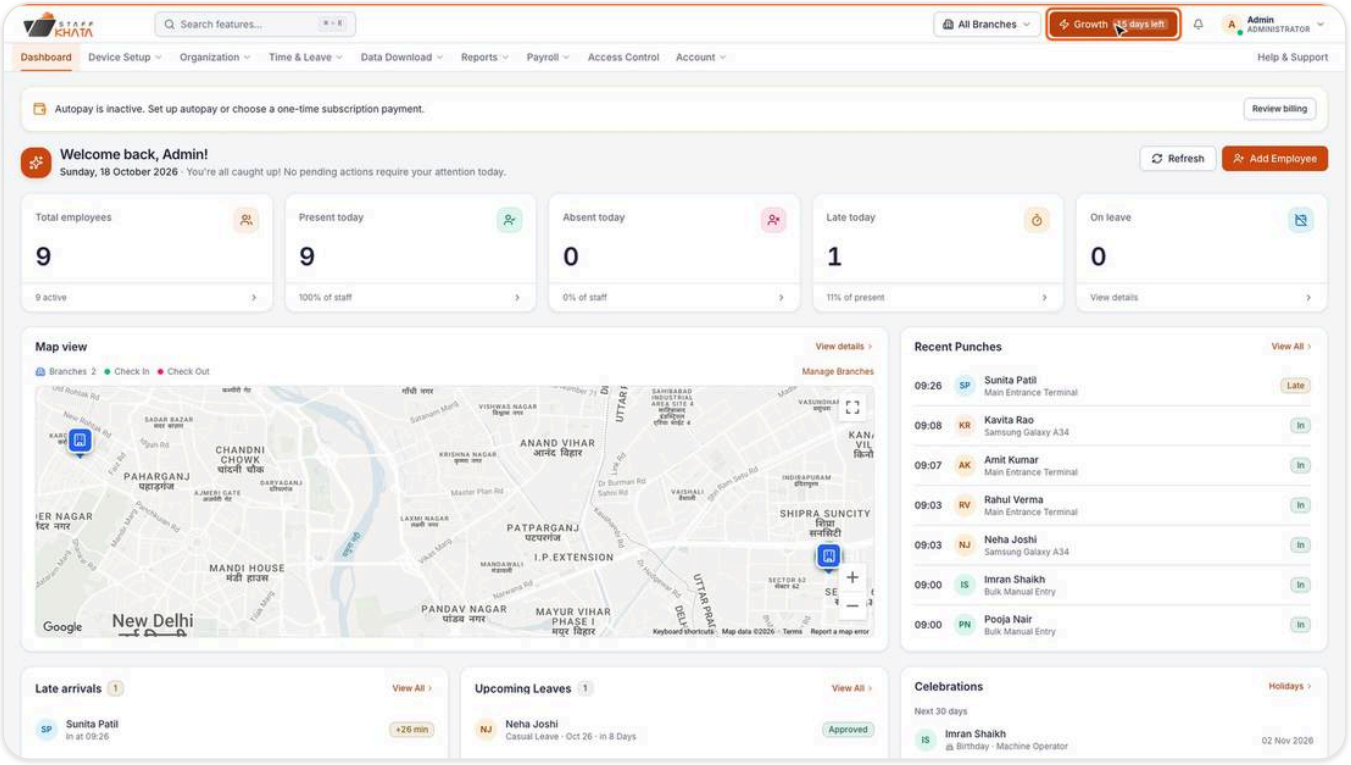
Plan: All plans

This chapter shows where to see your plan, how to upgrade, how to pay and download invoices, and how to get help. Only the Admin can see the plan badge and upgrade.

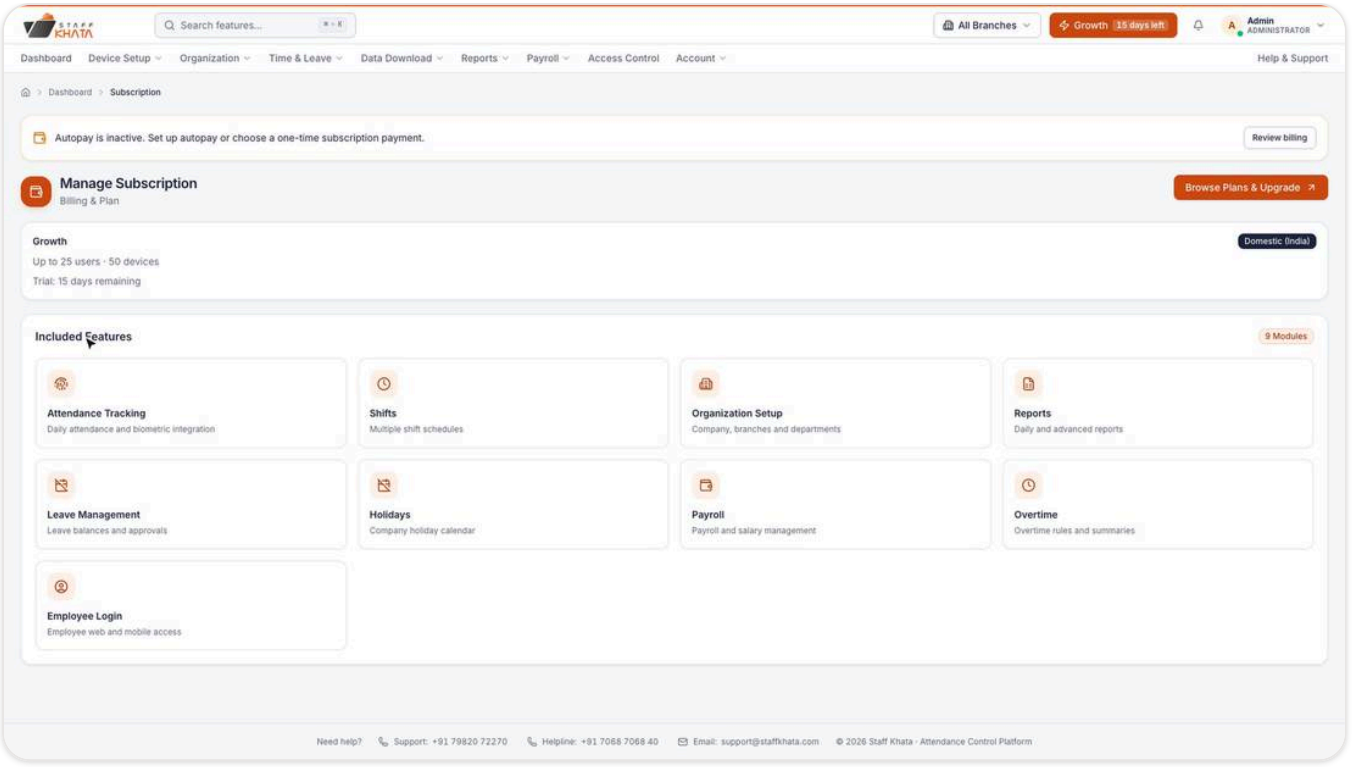
See your current plan

Your plan is always shown at the top of the page, with the number of trial days left.

1. Click the plan badge at the top right.



2. The **Manage Subscription** page opens. It shows your plan name, how many users and devices it allows, and how many trial days remain.
3. Under **Included Features**, you see every module your plan includes, such as **Attendance Tracking**, **Shifts**, **Leave Management**, **Payroll** and **Employee Login**.

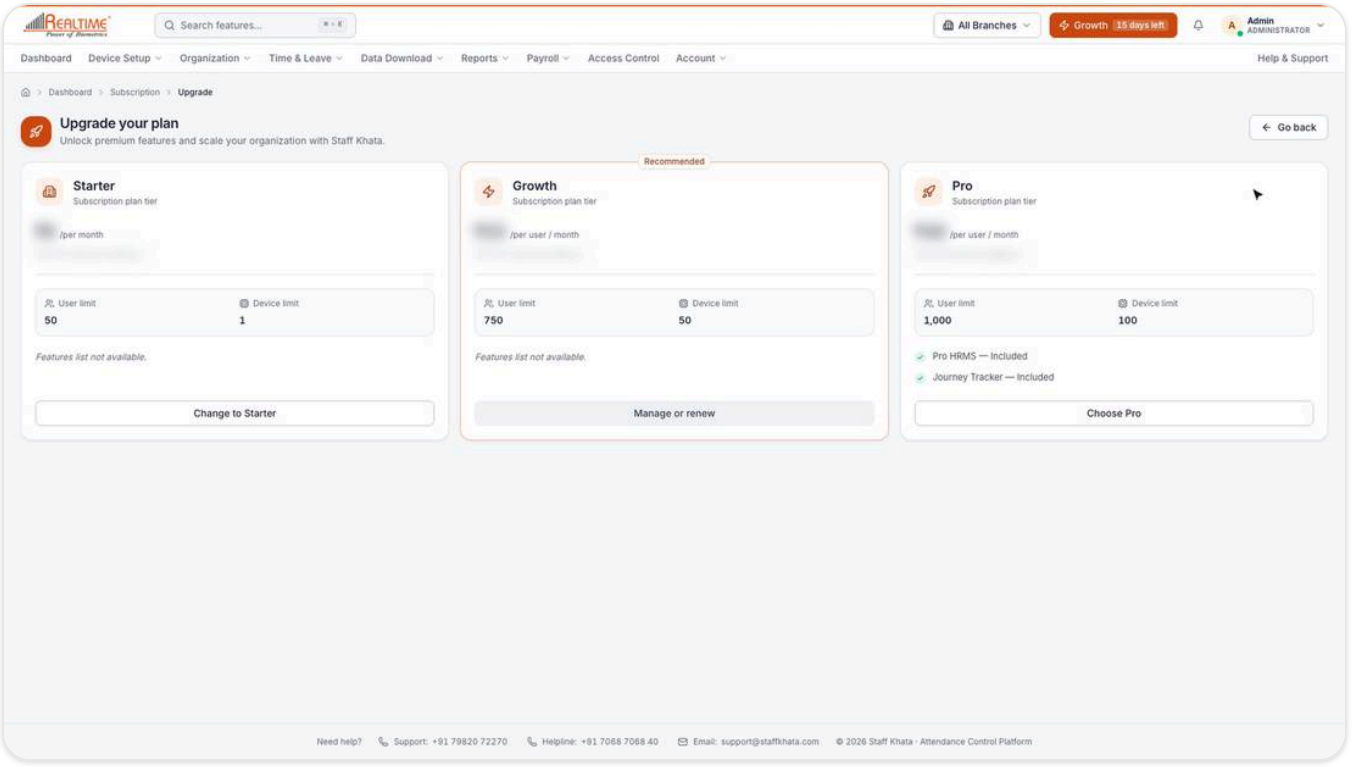


> **Note:** During the 15-day trial, everything is unlocked. After the trial your account moves to the entry plan, and some features may lock until you upgrade.

Upgrade your plan

Upgrade when you need more users, more devices or a locked feature.

1. On **Manage Subscription**, click **Browse Plans & Upgrade**.
2. **Upgrade your plan** shows each plan side by side, with its **User limit**, **Device limit** and features. One plan is marked **Recommended**. Some plans include add-ons such as Pro HRMS or Journey Tracker.
3. Click the button on the plan you want. On your current plan the button is **Manage or renew**.



Complete checkout

The checkout window lets you choose:

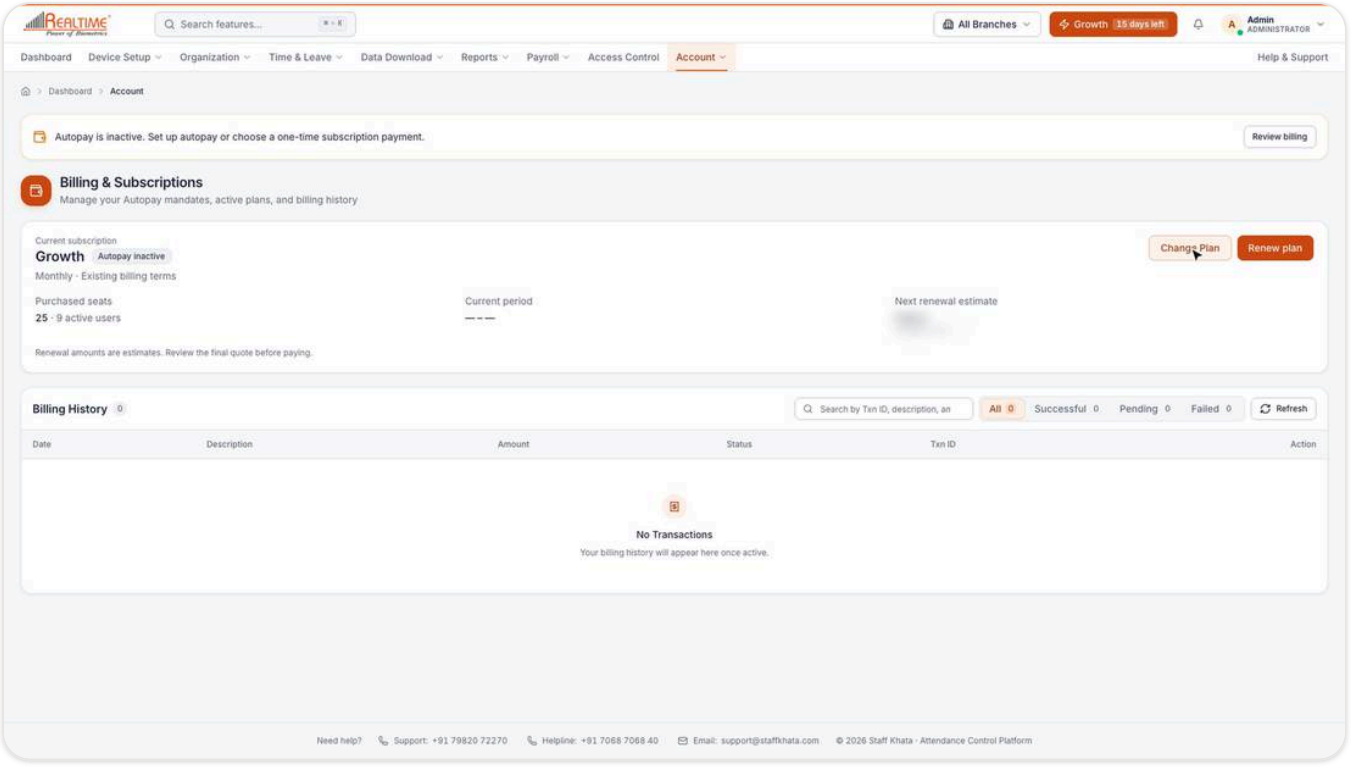
Option	What it does
Monthly or **Yearly**	How often you pay.
Purchased seats	How many users you pay for. Include room for future hires; your bill covers all purchased seats.
Add-ons (optional)	Extra modules, such as Pro HRMS or Journey Tracker, that your plan does not include.
Autopay	For monthly plans paid in India. Turn it on to renew every month without entering payment details again. Turn it off for a one-time payment with no automatic renewal.

The **Order summary** shows what you pay today, including GST, and the next renewal estimate. Click the pay button and finish payment in the secure payment window. See **Billing & Plan** for current prices.

> **Note:** Autopay is not available above a set monthly amount. In that case checkout switches to a one-time payment automatically.

Manage billing, autopay and invoices

1. Click **Account** → **Billing & Plan**. The **Billing & Subscriptions** page opens.
2. **Current subscription** shows your plan, whether autopay is on, your **Purchased seats** and active users, the **Current period** and the **Next renewal estimate**.
3. Click **Change Plan** to move to another plan, or **Renew plan** to pay for the next period.
4. If autopay is off, click **Enable Autopay** to set it up. You authorise a small payment so future monthly bills are collected automatically.
5. **Billing History** lists every payment. Filter by **All**, **Successful**, **Pending** or **Failed**, or search by transaction ID or amount.
6. Click **Invoice** on any row to download its PDF invoice.



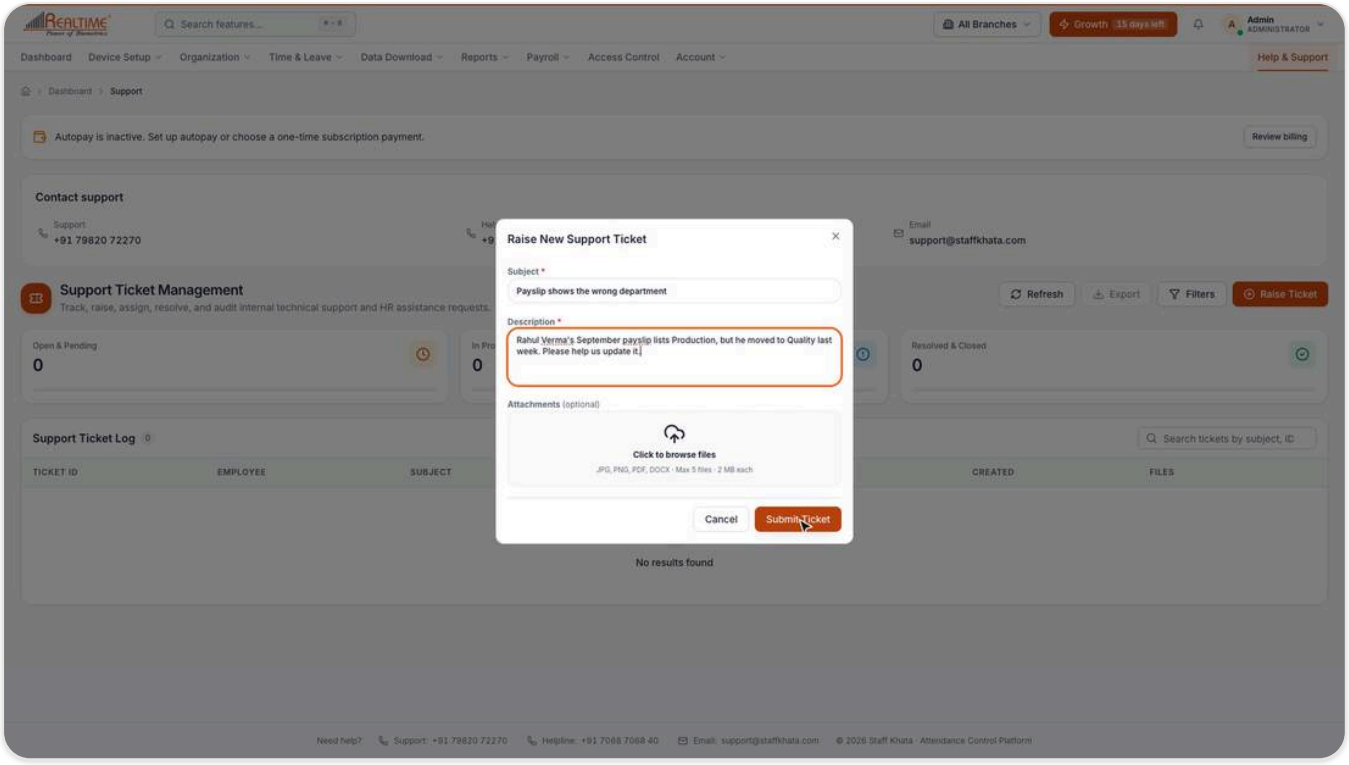
> **Tip:** The **Review billing** button on the autopay banner at the top of your dashboard opens

> the same page.

If your subscription lapses, a **Subscription Inactive** message blocks the dashboard. Click **Proceed to Payment** to pay and restore access.

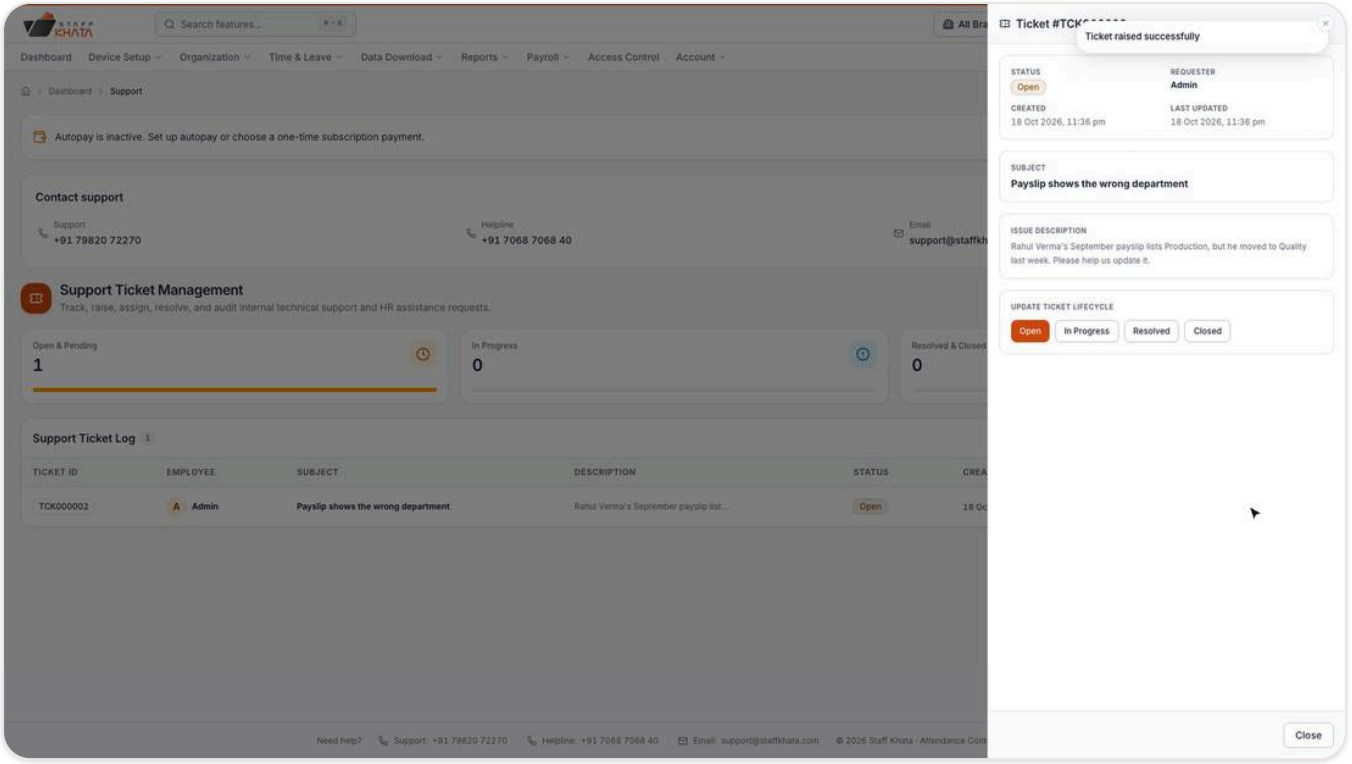
Get help and raise a ticket

1. Click your profile picture and choose **Help & Support**, or click **Help & Support** at the right of the menu bar.
2. **Contact support** at the top shows our support number, helpline and email.
3. To raise a ticket, click **Raise Ticket**.
4. Enter a **Subject** and describe the problem in **Description**.
5. Under **Attachments**, you can add up to 5 files (JPG, PNG, PDF or DOCX, 2 MB each), such as a screenshot.
6. Click **Submit Ticket**.



Your ticket is saved with a **Ticket ID** and appears in the **Support Ticket Log**. The cards at the top count tickets that are **Open & Pending**, **In Progress** and **Resolved & Closed**. Click

a ticket to see its details and status, which moves from **Open** to **In Progress**, **Resolved** and **Closed**.



> **Note:** Help & Support tickets are raised by the Admin or HR. Employees and managers should ask their company Admin for help first.

18

FAQ and troubleshooting

Plan: All plans

Quick answers to the questions customers ask most. If your problem is not here, raise a ticket from **Help & Support** (see Plans, billing and support).

Punching and devices

An employee can't punch in from their phone

Check these in order:

1. **Mobile punch is on for them.** In **Organization → Employee List**, open the employee's row menu and make sure mobile punch is turned on. If it is off, the app shows "Mobile punching disabled".
2. **Location is allowed.** On the phone, location services must be on and the Staff Khata app must have location permission.
3. **They are inside the geo-fence.** If the app says they are outside the allowed radius, they are too far from the office. Check the branch location and radius in **Organization → Branch**. See Mobile punch.
4. **Employee login is included in your plan.** Employees sign in to the app with their own login. If your plan does not include employee login, they see "Employee login is locked".

A biometric device shows offline

Check that the machine has power and internet, and that its server address is set as shown under **How to connect** in **Device Setup → Manage Devices**. Restart the machine after any change. Punches stored while it was offline are not lost: use **Data Download → Download data from Devices** to pull them for any date range. See Biometric devices.

> **Tip:** Turn on the WhatsApp alert for offline devices in **Organization → Company → Notifications**, so you hear about it straight away.

Which biometric devices are supported?

Only **Realtime** biometric devices. Other brands do not connect to Staff Khata.

An employee punched but the time is wrong or missing

Fix it in **Time & Leave** → **Manual Punch**, or approve the employee's correction request under **Regularization**. See Daily attendance.

Accounts and sign-in

I forgot my password

On the sign-in page, click **Forgot password?**, enter your work email, and follow the code sent to you. Full steps are in Sign up and first login.

An employee forgot their password

The Admin sets each employee's login when adding them. Edit the employee from **Employee List** to set a new one, or the employee can use **Forgot password?** with their own email.

I didn't get the sign-up code

Wait for the timer, then click **Resend Code**. Check your spam folder, and make sure the phone number can receive SMS.

How do I change the language?

Click your profile picture → **Language**, and pick from 55 languages. Before you sign in, use the language button in the top corner of the page.

Reports and data

An employee is missing from a report

- Check the **branch switcher** at the top. If one branch is selected, you only see that branch's staff. Choose **All Branches**.
- Check who you selected to include in the report's filters.
- Check the employee is **Active** in **Employee List**, and that their joining date is before the report period.

How do I export a report?

Open the report and use the **Export** menu to download it as **Excel** or **PDF**, or to print it. See Reports.

Why is a menu item locked?

A lock means your plan does not include that feature. Click the plan badge to see your plan, or see the table below.

What happens when the trial ends?

Your account moves to the entry plan. Your data stays. Features your new plan does not include are locked until you upgrade.

Who can do what

HR users sign in to the same admin screens as the Admin. Managers need the Pro HRMS add-on.

Feature	Admin	HR	Manager	Employee
Dashboard	Whole company	Whole company	Own team	Own
Company, branches, departments	Yes	Yes	—	—
Attendance rules and office time	Yes	Yes	—	—

Feature	Admin	HR	Manager	Employee
Add and edit employees	Yes	Yes	View own team	Own profile
Biometric devices	Yes	Yes	—	—
Shifts and roster	Yes	Yes	—	—
Daily attendance and manual punch	Yes	Yes	View own team	Own; request corrections
Punch in and out	—	—	Yes	Yes
Leave	Set up and approve	Set up and approve	Approve own team	Apply
Holidays	Yes	Yes	—	—
Payroll and salaries	Yes	Yes	—	Own payslips
Reports	Yes	Yes	—	—
WhatsApp alerts and integrations	Yes	Yes	—	—
Plan badge and upgrades	Yes	—	—	—
Help & Support tickets	Yes	Yes	—	—

Which plan do I need

Every new company gets a 15-day trial with everything unlocked. After that:

Feature	Plan needed
Attendance from phones and Realtime devices, daily report, branches, departments	All plans
Leave, holidays, overtime, multiple shifts	May need a higher plan

Feature	Plan needed
Employee login on web and mobile (employee self-service and app punch)	May need a higher plan
Weekly, Monthly and Yearly reports, other advanced reports, Access Control, Data Download	Paid plan with advanced reports
Payroll, salaries, reimbursements, payslips, government reports	Paid plan with payroll
Manager role, company feed, org tree, assets	Pro HRMS add-on
Live tracking of field staff	Journey Tracker add-on

> **Plan needed:** Plans and what they include can change. Click the plan badge → **Browse Plans & Upgrade** for the current list, and see **Billing & Plan** for current prices.