

HR, CRM and Project Management

Customer Onboarding

StrotHR

Your People, Our Platform.

- **Title**

Your trusted all-in-one HRMS for seamless employee and HR management.

- **Description**

It brings all essential HR functions into one seamless dashboard, empowering users to easily manage tasks, track attendance, balance team workloads and engage in upcoming events and celebrations.

- **Easily manage employee data worldwide**

Effortlessly manage your global workforce data with a secure, streamlined HR solution. Enhance the employee experience by simplifying everything from creating and maintaining records to supporting daily HR tasks—while ensuring compliance across all regions.

- **Why HRMS Software is Essential for Businesses**

In today's dynamic business environment, managing human resources comes with several challenges—ranging from complex labor laws and multi-state compliance to handling diverse workforces and supporting rapid organizational growth.

This is where HRMS software becomes not just beneficial, but essential, enabling businesses to streamline operations, ensure compliance, and manage their workforce more efficiently.

- **Track employee time with real-time, system-level activity insights**

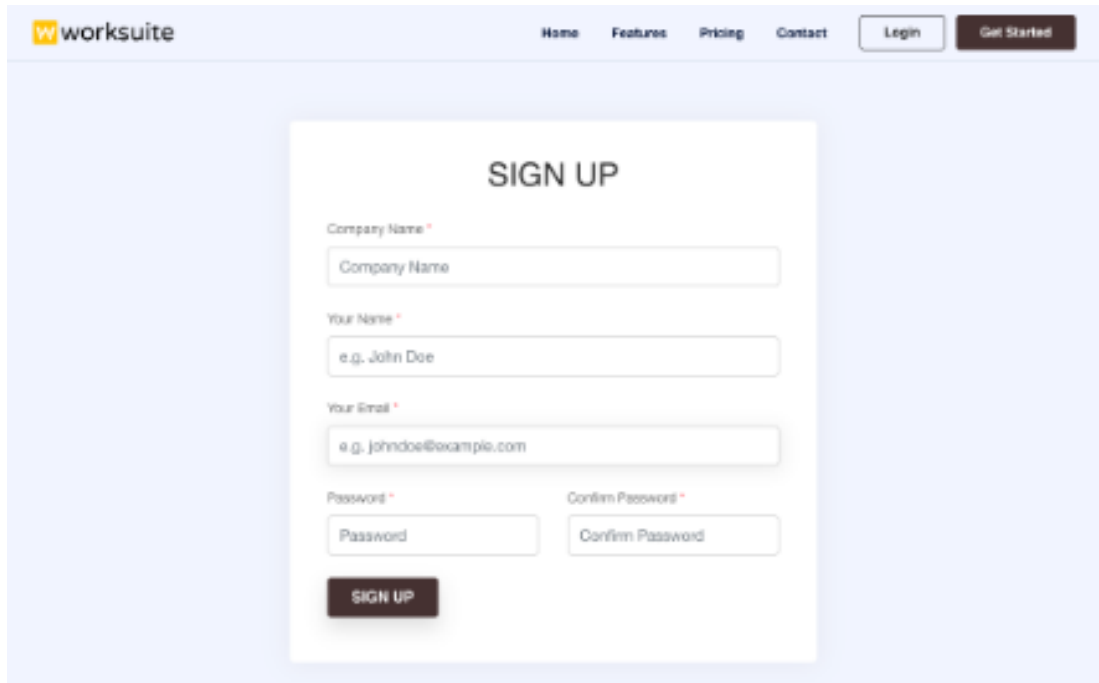
The system captures actual work hours through automated time and attendance tracking with detailed reporting. It helps identify productivity gaps using real-time, desktop-based time logging and analytics.

Additionally, it improves schedule adherence with efficient staff time tracking and live dashboards, ensuring better workforce management and operational efficiency.

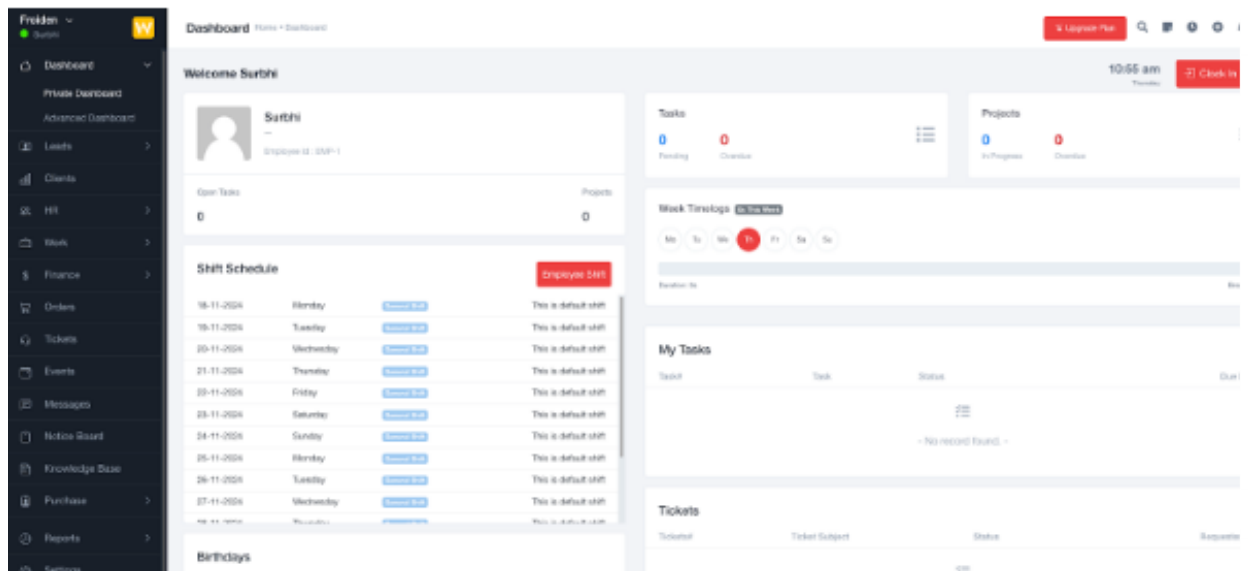
- **Core Features to Look for in HRM Software**

Choosing the right HRM software requires a clear understanding of the features that truly add value. Ready to move on? HRM is your all-in-one upgrade.

- First, the Customer needs to Sign Up.

A screenshot of the 'worksuite' website's sign-up page. The page has a light blue background. At the top, there is a navigation bar with the 'worksuite' logo on the left and links for 'Home', 'Features', 'Pricing', 'Contact', 'Login', and a 'Get Started' button on the right. The main content area features a white box with the title 'SIGN UP' in bold. Below the title are four input fields: 'Company Name' (with a red asterisk), 'Your Name' (with a red asterisk and placeholder text 'e.g. John Doe'), 'Your Email' (with a red asterisk and placeholder text 'e.g. johndoe@example.com'), and 'Password' (with a red asterisk). To the right of the 'Password' field is a 'Confirm Password' field (also with a red asterisk). At the bottom of the form is a dark brown 'SIGN UP' button.

- After Sign Up he will be redirected to the Private Dashboard.



Users can navigate into the applications. We have many menus.

- Private dashboard
- Advanced Dashboard
- Leads
- Clients
- HR
- Work
- Finance
- Order
- Tickets
- Events
- Message
- Notice Board
- Knowledge base
- Reports
- Setting.

We have multiple settings in the application. The admin can set the details in the settings according to their use.

Here is the brief of multiple settings :

1. Company Setting

Understanding and Controlling the overall settings of the entire system needs separate control panels to focus on specific details, one such section is the **COMPANY SETTINGS Panel**. This section consists of the basic company details that are commonly

used in legal and non-legal documents that are formulated for various uses like **Estimates, Invoices, Contracts, etc.**

Company Settings

Company Name *

WorkSuite

Company Email *

company@email.com

Company Phone *

1234567891

Company Website

https://worksuite.biz

Save

2. App Setting

- APP Settings** are the **default settings** that are applied to all the user systems who are using it through the company's database. These settings control every device connected to it. It creates uniformity amongst its users.

App Settings

Client Sign up Settings

Date Format

d-m-Y (21-11-2024)

Time Format

12 Hour(s) (11:17 am)

Default Timezone

Asia/Kolkata

Default Currency

\$ (USD)

Language

English

Datable Row Limit

10

Employee can export data

☒

Save

- CLIENT SIGN UP SETTINGS** enables the feature of self-login for clients. This is controlled by the admins and is easy to select depending on the choice of the organization. It offers the freedom of logging in and setting information by themselves for clients.

App Settings

Client Sign up Settings

☐ Allow Client Signup

Client Signup URL

https://worksuite-saas.test/client-signup/880f96c058006d23ea85b321fcbb1ce

Copy

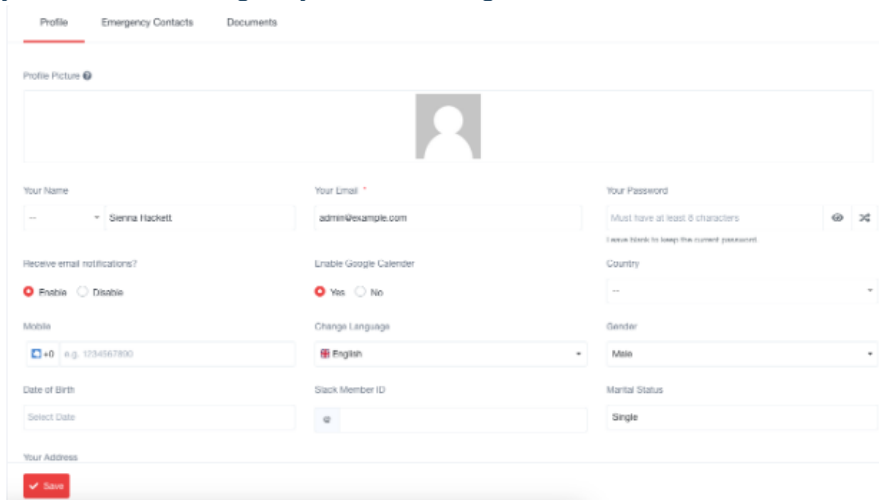
(This URL will be used by the client to register on the website.)

Save

3. Profile Setting

Customizing your profile as per your liking with your general details makes it more personalized for one's use. This feature allows editing and customization of your profile as per your liking.

Where you can add emergency contact along with Documents.

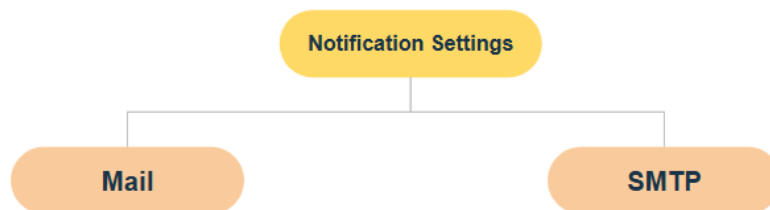


The screenshot shows a 'Profile' settings page with tabs for 'Profile', 'Emergency Contacts', and 'Documents'. The 'Profile' tab is active. It includes a 'Profile Picture' upload area, a 'Your Name' dropdown menu (currently showing 'Sienna Hackett'), a 'Your Email' text field (currently 'admin@example.com'), and a 'Your Password' field with a strength indicator. Below these are several toggle and selection options: 'Receive email notifications?' (set to 'Enable'), 'Enable Google Calendar' (set to 'Yes'), 'Country' (dropdown), 'Mobile' (text field with '+0' and 'e.g. 1234567890'), 'Change Language' (dropdown set to 'English'), 'Gender' (dropdown set to 'Male'), 'Date of Birth' (date picker), 'Slack Member ID' (text field), and 'Marital Status' (dropdown set to 'Single'). A 'Save' button is at the bottom left.

4. Notification Settings

Organizing and staying up to date with all the work-related information is necessary but customizing the receiving of notifications at your convenience is also important. This setting section helps in **customizing the notification-receiving** system conveniently.

There are different notification settings which are as follows:



It has options for either **Mail** or **SMTP** (Simple Mail Transfer Protocol), Our Recommendation for SMTP is <https://get.smtp2go.com/froiden>

5. Currency Settings

Arranging and customizing the finances of the organization in terms of the frequently used currencies is important. Thus, to ease this task and make the frequency of handling this task less than normal this section provides the space for customization. It allows the addition of **different currencies** and **transactions** are being made so that the users can **switch** to one of their **convenient currencies for finance management**.

Exchange rate is calculated from your default currency. Change default currency in App Settings.

[+ Add New Currency](#) [Currency Converter Key](#)

Currency Settings

Currency Name	Currency Symbol	Currency Code	Exchange Rate	Currency Format	Action
Dollars	\$	USD	0.012	\$1,000.000	Edit Delete
Pounds	£	GBP	1	£1,000.00	Edit Delete
Euros	€	EUR	1	€1,000.00	Edit Delete
Rupee Details	₹	INR	1	₹1,000.000	Edit

6. Payment Credentials

Payment Credentials offer the space to users for specifying their credentials for different payment platforms that they accept payments through. This **redirects the customers** directly to the **payment page** while making a payment to the organization, saving the effort and time of sending the details to every customer individually.

[Paypal](#) [Stripe](#) [Razorpay](#) [Paystack](#) [Mollie](#) [Payfast](#) [Authorize.net](#) [Square](#) [More](#)

☐ Paypal Status

[Flutterwave](#)

[Offline Payment Meth](#)

[Save](#)

7. Finance Settings

This section of settings mainly focuses on setting up the default yet necessary details that are used in nearly all the similar options throughout the working system. These include the **Invoice logo, Invoice settings, Estimate settings, Credit settings, Due after, and send a reminder**. GST number, Language, Templates, and Terms, and Conditions.

The **Invoice Settings** allows setting the default Invoice Prefix and the number of digits that are allowed to be printed as the Invoice number. It also presents a sample from the data that has been input.

Profile Settings



Profile Picture

Choose a file

Language

English

Timezone

EST

Send Reminder Notice

0

Send Reminder Notice

0

☐ Show my profile on profile

☒ Show my profile on profile

☐ Show my profile on profile

☐ Show my profile on profile

☐ Show my profile on profile

☐ Show my profile on profile

Check info to show on profile

☒ Show Name

☒ Show Email

☒ Show Phone

☒ Show Address

☒ Show Profile on profile

Send and Conditions

Thank you for your feedback

Other information

Enter Other Information

Save

8. Ticket Settings

Tickets are the one option to contact the authorities for any kind of problems, queries or difficulties faced. Ticket settings allow one to set up **Ticket Agents**, **Ticket Types**, **Ticket Channels**, and **Reply Templates**, **Ticket visibility**.

Ticket Agents are employees of the organization who are assigned tickets to answer back to help the person resolve any discrepancy that has occurred.

[+ Add New Agents](#)

Ticket Agents	Ticket Types	Ticket Channel	Reply Templates
Name	Group	Status	Action
 Dasia Lettler Team Lead	Management	Enabled	
 Thaddeus Zboncak Trainee	Code	Enabled	
 Quincy Rogahn II Junior	Sales	Enabled	
 Quincy Rogahn II Junior	Management	Enabled	
 Dr. Meta Rohan Trainee	Management	Enabled	
 Justina Grimes MD Team Lead	Management	Enabled	

- Ticket Visibility Feature: -**

The Ticket Visibility setting in the CRM allows users to control which tickets they can view based on predefined visibility options. Users can customize visibility as follows:

- **All Tickets:** View every ticket in the system.
- **Tickets in a Group:** View tickets assigned to the user's group.
- **Assigned Tickets:** View only tickets directly assigned to the user.

This feature ensures that users have access to relevant tickets, improving focus and efficiency.

Ticket Agents Ticket Groups Ticket Types Ticket Channel Reply Templates Round Robin **Ticket Visibility Setting**

Settings for Ticket Agents

Scope for Ticket Visibility

☒ **All Tickets**
Can view and edit all tickets.

☐ **Tickets in a group**
Can view and edit tickets in their groups and ticket assigned to them.

☐ **Assigned Tickets**
Can view and edit tickets assigned to them.

- **Round Robin:** With Round and Robin Method tickets will assign agents in **Equal Distribution, Sequential Assignment and fair rotation will apply.**

Ticket Agents Ticket Groups Ticket Types Ticket Channel Reply Templates Round Robin Ticket Visibility Setting

Round Robin

☒

Information:

Round-Robin Method

• **Equal Distribution:** Tasks are evenly distributed among team members.

• **Sequential Assignment:** Each task is assigned to the next user in order.

• **Fair Rotation:** Promotes balanced workloads and prevents overload.

Example: Tickets go to Agent A, then B, then C, and repeat.

Example: In a customer support system, incoming tickets are assigned in a round-robin fashion. The first ticket goes to Agent A, the second to Agent B, the third to Agent C, and the fourth back to Agent A, continuing in this pattern.

Using the round-robin method ensures fair and efficient task distribution, promotes balanced workloads, and streamlines resource allocation.

9. Project Settings

Project Settings are specified for **sending in work reminders** before the due date of the work taken up. Through this setting, you can enable or disable the reminders feature. In case you enable the reminders you get the chance to customize whether **who receives the reminders** and **before how many days** of the due date.

This is mainly to get the work done on time and avoid the last-minute hassle.

Project Settings Project Status Settings Project Category

☐ Send Reminder ?

10. Attendance Settings

Attendance is an essential feature in any working system, it marks the attendance and compiles the data for records.

This section allows customisation of certain features like **office timings, several clock-ins, late mark time limit, working days, and clock in/clock out details.**

Attendance Settings Employee Shifts Shift Rotation QR Code

- ☒ Allow employee to request shift change
- ☐ Save Clock-in Location
- ☒ Allowed Employee self Clock-In/Clock-Out
- ☐ Auto clock-in employee by first sign in
- ☐ Clock-in check with added location Radius
- ☐ Allow clock-in outside shift hours
- ☐ Clock-in check with added IP address
- ☐ Send monthly attendance report email

Week Starts From: Monday Attendance Reminder Status: ☐

11. Leave Settings

Leave settings to define the criteria for leaves. It differentiates the categories of leaves that might be taken by an individual and sets the number of days for leave allowed under each category that is allowed. It sets their paid/unpaid status depending on the organization's criteria.

- **Archive Leave**

Archiving this leave prevents direct deletion, as the user has already taken it. Once archived, it can only be permanently deleted later.

+ Add New Leave Type							
Leaves Type Settings		Leaves General Settings		Archived Leaves Type			
Leave Type	Leave Absentment Type	No of Leaves	Monthly Limit	Leave Paid Status	Department	Designation	Action
Casual	Monthly	1	--	Paid	1. Marketing 2. Sales 3. Human Resources 4. Public Relations 5. Research 6. Finance	1. Trainee 2. Senior 3. Junior 4. Team Lead 5. Project Manager	Edit Archive
Sick	Monthly	1	--	Paid	1. Marketing 2. Sales 3. Human Resources 4. Public Relations 5. Research 6. Finance	1. Trainee 2. Senior 3. Junior 4. Team Lead 5. Project Manager	Edit Archive
Earned	Yearly	5	--	Paid	1. Marketing 2. Sales 3. Human Resources 4. Public Relations 5. Research 6. Finance	1. Trainee 2. Senior 3. Junior 4. Team Lead 5. Project Manager	Edit Archive

Leaves Type Settings		Leaves General Settings		Archived Leaves Type			
Leave Type	Leave Absentment Type	No of Leaves	Monthly Limit	Leave Paid Status	Department	Designation	Action
Vaca	Yearly	12	--	Paid	1. Marketing 2. Sales 3. Human Resources 4. Public Relations 5. Research 6. Finance	1. Trainee 2. Senior 3. Junior 4. Team Lead 5. Project Manager	Restore Delete
Non Vac	Yearly	12	0	Paid	1. Marketing 2. Sales 3. Human Resources 4. Public Relations 5. Research 6. Finance	1. Trainee 2. Senior 3. Junior 4. Team Lead 5. Project Manager	Restore Delete

12. Custom Fields

Custom Fields, mainly used to add extra answerable spaces in the pre-generated forms. It is used to customize the data entry spaces as per the required data by the organization from each candidate.

This setting section offers an **Add Field** option which offers spaces to choose the additional criteria in each section for convenient working.

+ Add Field

Custom Fields

Client
1 Field

View Fields

Employee
1 Field

View Fields

+ Add Field

Custom Fields

Client
1 Field

View Fields

Employee
1 Field

View Fields

13. Roles and Permissions

Roles and Permissions is that section of settings that control the accessibility of each working individual in the organization. The vast variety of modules offers a deeper insight into the working of an organization but it is important to also recognize and differentiate what is to be accessed by whom when this section comes into play and controls accessibility for each module for individuals.

Manage Role

Roles & Permissions

Employee
32 Member

Permissions

Client
31 Member

Permissions

Manager
0 Member

Permissions

14. Message Settings

Messaging acts as a key feature mainly because it allows communication among the individuals involved virtually for improving the outcome of tasks taken in hand. This setting allows choosing the message channel activity which should be kept active and inactive depending upon the needs. It has this option mainly for selecting if the client and admin or client and employee should be allowed to communicate and contact each other or not.

Message Settings

☐ Allow chat between client and employees?
☐ Allow chat between client and admin?

Send Sound Notification Alert ?

No

✓ Save

15. Storage Settings

Data Storage for any work done in an organization is important but this can be done either using the **Local Storage** option or **AWS** (Amazon Web Services). The two options are easily switchable and solely depend on the needs of the organization. If the needs aren't met using one option then there is always another option to switch to. Storage is necessary because data collection for different projects taken up is necessary. So, to ease the work these storage options have been given.

Storage Settings

- **Local (Default)** means that the files you upload will be stored on your own server within the `public/lean-uploads` directory.
- **Suggestion:** Consider using [DigitalOcean Spaces](#), [AWS S3](#), [Wasabi](#) or [Minio](#) Storage for an additional layer of security

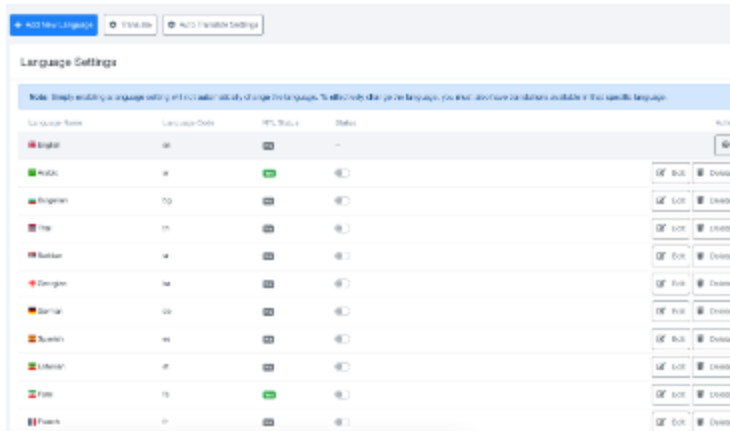
Select Storage

Local (Default)

✓ Save

16. Language Settings

Language, barrier for communication when two people have different languages and bridge the gap when found common. This setting section works on making the user interface more friendly by providing the option of selecting languages that are generally spoken by the members. This then helps those who are using the system to select their preferred languages amongst the ones provided in the list by the organization.



17. Lead Settings

Leads, the potential customer for the organization generally have queries to be answered before taking up a project with any organization. So, to help them through their queries these settings are formed.

These settings set up the **Lead Source**, which defines the passage from where the acceptance of queries is permitted.

Settings	Description
Deal Pipeline	It is a visual representation of the stages that potential sales or business deals go through, from initial contact to closing
Deal Agent	It is a feature or tool within the CRM platform that helps manage and track the lifecycle of a sales opportunity or deal
Deal Category	This section is mainly for segregating the different lead queries that are received into categories depending on their general distribution
Round-Robin	This is a scheduling method used to allocate tasks, responsibilities, or resources in a cyclic and equal manner among a group of individuals or entities. The process repeats in a loop until all participants have had a turn

These individual categories under lead settings are also editable depending on the requirements. These settings are open for customization to allow the freedom of usage for the users.

+ Add New Lead Source				
Lead Source	Pipeline	Deal Agent	Deal Category	Round Robin
#	Name			Action
1	Free			Edit Delete
2	Google			Edit Delete
3	Facebook			Edit Delete
4	Friend			Edit Delete
5	Direct			Edit Delete
6	Tv			Edit Delete

18. Time Log Settings

Time Logging, a feature added in this system, is mainly to track the time taken by individual tasks or projects as a whole for completion. It is necessary to start the timer and keep track of work using it. These settings permit the turning off of the timer after the office hours end and also to check if the time logging activity should demand approval or not.

Time Log Settings

Stop timer automatically after shift end time
☐

TimeLog will require approval
☐

Send time tracker reminders
☐

Send Daily TimeLog Report
☐

Save

19. Task Settings

Task, division of one complete project/work into numerable parts for easy completion, and work satisfaction is done through creating tasks. Once the tasks are completed one after the other there are higher chances of getting the project completed on time via this method. Thus, this working system offers the features of creating tasks.

Task Settings

Send Reminder

Send task reminder **before** X days of due date

Send task reminder on the day of due date

☒ Yes ☐ No

Send task reminder **after** X days of due date

Status

Incomplete

Taskboard Default Length

10

Sections visible to client

- ☒ Task category
- ☒ Due Date
- ☒ Label
- ☒ Priority
- ☒ Comment
- ☒ Timesheet
- ☒ Hours Logged

- ☒ Project
- ☒ Assignee To
- ☒ Assignee By
- ☒ Make Private
- ☒ Add File
- ☒ Notes
- ☒ Custom Fields

- ☒ Start Date
- ☒ Description
- ☒ Status
- ☒ Time estimate
- ☒ Sub Task
- ☒ History
- ☒ Copy Task Link

☒ Save

20. Social Login Settings

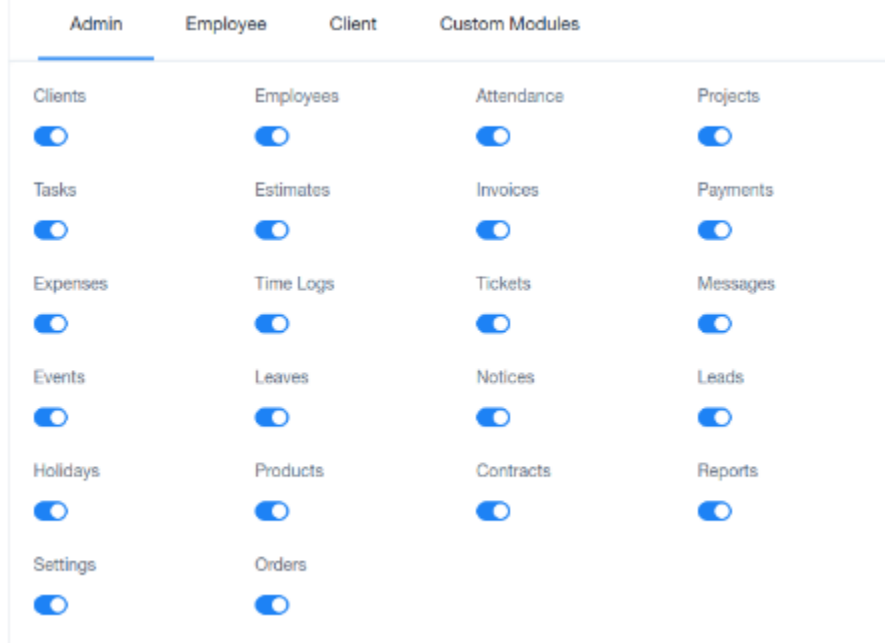
Social Login Settings, gives space to store the login credentials for all the social media handles that are regularly updated and taken care of by the organization. This allows easy working with the social media platforms. The major work of this section of the setting is to permit space for the compilation and storage of login credentials altogether.

The screenshot shows a 'Social Login Settings' interface. At the top, there are four social media login options: Google, Facebook, LinkedIn, and Twitter, each with a red dot indicating a status. Below these, there is a 'Status' checkbox. At the bottom, there is a blue 'Save' button with a checkmark icon.

21. Security Settings

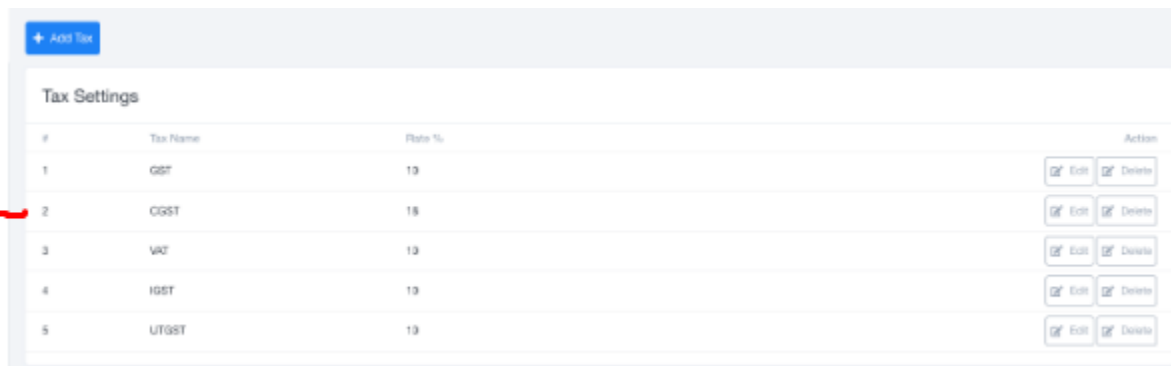
Security of data is important for any user when they are working with a software system. This system works on protecting the data by ensuring usage from a safe audience. This allows **Google Recaptcha** and provides **two options** to choose from i.e. **V2 or V3**. Through this section of the setting, one can select their preferred security method as per the needs of their system.

clean and useful workspace. This makes it ideal for organizing all kinds of work and plans in an individual's panel resulting in better efficiency of the product at hand.



24. TAX Setting

Companies can set their tax to use in products , invoices etc.



PAYMENT CREDENTIAL SETUP

We have many more payment credentials . Here the example of stripe set up :—

Stripe Payment Credentials Setup

- To setup **Stripe**, you will need **API secret key** and **API publishable key**.
- To get these, please follow the steps below:
 - Log in to your Stripe account
 - Click "**Developers**" from the top left menu item of the page
 - Click the "**API Keys**" submenu item

If you toggled “**Viewing testing data**”, Stripe will show the test keys, otherwise, the live keys will be shown, **for production** you will need the “**Live Secret Key**” and “**Live Publishable Key**”

API keys

Learn more about API authentication →

Viewing test API keys. Toggle to view live keys.

Viewing test data

Standard keys

NAME	TOKEN		LAST USED	CREATED
Publishable key	pk_test_XeJ2y910TT6H8XxG1R3ghrNw		27-Aug	07-Sep-2015
Secret key	Reveal test key token		27-Aug	07-Sep-2015

Restricted keys

+ Create restricted key

NAME	TOKEN	LAST USED	CREATED
No restricted keys			