EPORDO

EPORDO | Cloud Attendance | Payroll

Payroll Quick Start Guide

Configure and run your first locked payslip in 9 steps (30-45 minutes)

EPORDO Payroll - Quick Start Guide

Goal: Configure a minimal monthly payroll and produce your **first locked payslip** in one session.

Time: 30-45 minutes (assuming employees already exist in EPORDO)

Prerequisite reading: 01 - Overview & Framework (optional, 15 min)

Before You Begin - Prerequisites Checklist

What We Will Build (Minimal Example)

A simple **monthly fixed salary** structure:

After setup you will: assign 1+ employees -> open a period -> run payroll -> lock payslips.

Step-by-Step Setup (9 Steps)

Step 1 - Create a Payroll Policy (5 min)

Menu: Payroll -> **Payroll Settings** -> tab **Payroll Policies** -> **Add**

Click **Save**.

Step 2 - Review Input Definitions (2 min)

Menu: Payroll Settings -> tab **Input Definitions**

The platform maintains four **system payment-day inputs** (do not delete):

- `working_days`
- `payment_days`
- `employed_payment_days`
- `period_payment_days`

  For this minimal example you do **not** need extra inputs. Add them later for overtime, allowances, etc.

  ## Step 3 - Skip Tax Slabs (for now)

  Menu: Payroll Settings -> tab **Income Tax Slabs**

  Skip this tab in Quick Start. Return when you need automatic income tax.

  ## Step 4 - Create a Salary Component (3 min)

  Menu: Payroll Settings -> tab **Salary Components** -> **Add**

  Optional: enable **Depends on payment days** if you prorate by attendance days.

  Click **Save**.

  ## Step 5 - Create a Salary Structure (5 min)

  Menu: Payroll Settings -> tab **Salary Structures** -> **Add**

  Add component row:

  Required inputs: For fixed salary only, you may leave minimal requirements. If BASIC uses payment-day proration, include the system payment-day inputs.

Click **Save**. Fix any sequence validation errors if shown.

Step 6 - Assign Employees (5 min)

Menu: Payroll -> **Salary Assignment** -> **Add Assignment**

For each pilot employee:

Tip: Use **Batch Assignment** to assign many employees at once (same structure and settings).

Rule: No overlapping assignments for the same employee.

Step 7 - Create Period and Run (3 min)

Menu: Payroll -> **Payroll Processing**

Step bar: Period & Run

1. Click
   Create Period
   - enter start and end dates (e.g. `2026-07-01` to `2026-07-31`).
2. Select the period in the list.
3. Click
   Create Run
   .

If you see *"No employees with valid assignment"*, return to Step 6 and check effective dates and base salary.

Step 8 - Prepare Inputs and Calculate (5 min)

Step bar: Prepare Inputs

4. Open

Calculation preflight

- confirm employee count and no missing required inputs.

5 If you use Provider sources, click **Collect provider inputs**; otherwise skip.

6 For manual inputs, enter values and click **Save Inputs** (required-even if empty for this minimal case, confirm preflight passes).

Step bar: Calculate

7 Click **Calculate**.

Hard rule: Every employee must have all required inputs saved. One missing value **blocks the entire batch**.

On success, status changes to **Calculated**. Review gross and net in the preview.

Step 9 - Approve and Lock (2 min)

Step bar: Approve -> click **Approve**

Step bar: Lock -> click **Lock**

Payslips are now **immutable**. PDF snapshot uses your **current UI language**.

View results: Payroll -> **Payslip Inquiry** -> filter by period/run -> **View** / **Export PDF** / **Export Excel**.

Congratulations - Your First Pay Run Is Complete

You have completed the full lifecycle:

```
Settings -> Assignment -> Period -> Run -> Inputs -> Calculate -> Approve -> Lock -> Payslip
```

Monthly Operations Cheat Sheet

Repeat **Steps 7-9** every pay cycle. Review assignments only when salaries or structures change.

What to Add Next

Details: 03 - Complete User Guide

Common Quick Start Issues

Quick Reference - Menu Paths

```
 Payroll
├── Payroll Settings
│   ├── Payroll Policies          <- Step 1
│   ├── Input Definitions         <- Step 2
│   ├── Provider Catalog          <- (browse only)
│   ├── Income Tax Slabs          <- (skip in quick start)
│   ├── Salary Components         <- Step 4
│   └── Salary Structures         <- Step 5
├── Salary Assignment             <- Step 6
├── Payroll Processing            <- Steps 7-9
└── Payslip Inquiry               <- View results
```

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