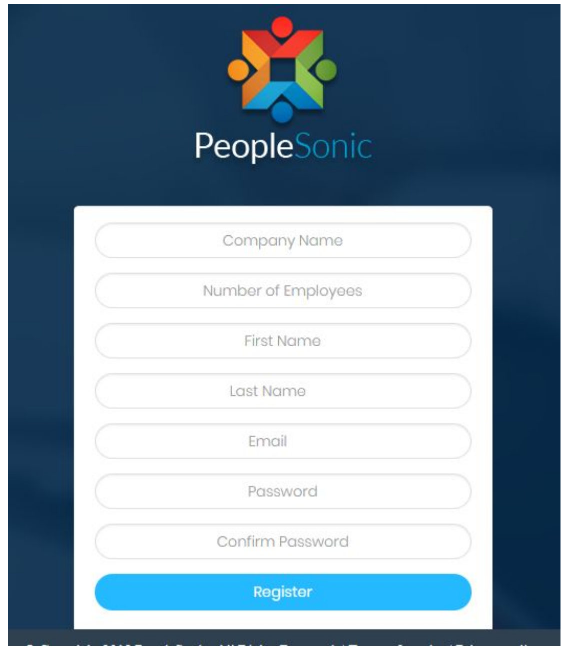
Basic Tutorial

Creating New Account



To create your company profile, you must register with your company's main admin account by visiting:

https://hk.peoplesonic.com/#/register

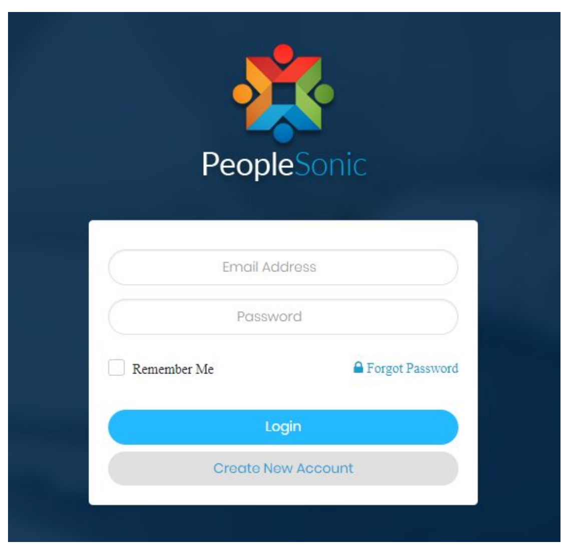
Fill the following information correctly to sign up at PeopleSonic.

- Company Name
- Number of Employees
- First Name
- Last Name
- Email
- Password
- Confirm Password

After you fill in the required information, you will receive a confirmation email at your registered email address to activate your company.

You would need to click on the link mentioned in the email in order to activate the company account. The best approach is to register with your company admin email account because it will become your main company admin which will have all the rights to configure your company. Also make sure you add your employees with company email addresses.

Login to PeopleSonic:



Once your company is registered and activated. You can login to the portal by visiting:

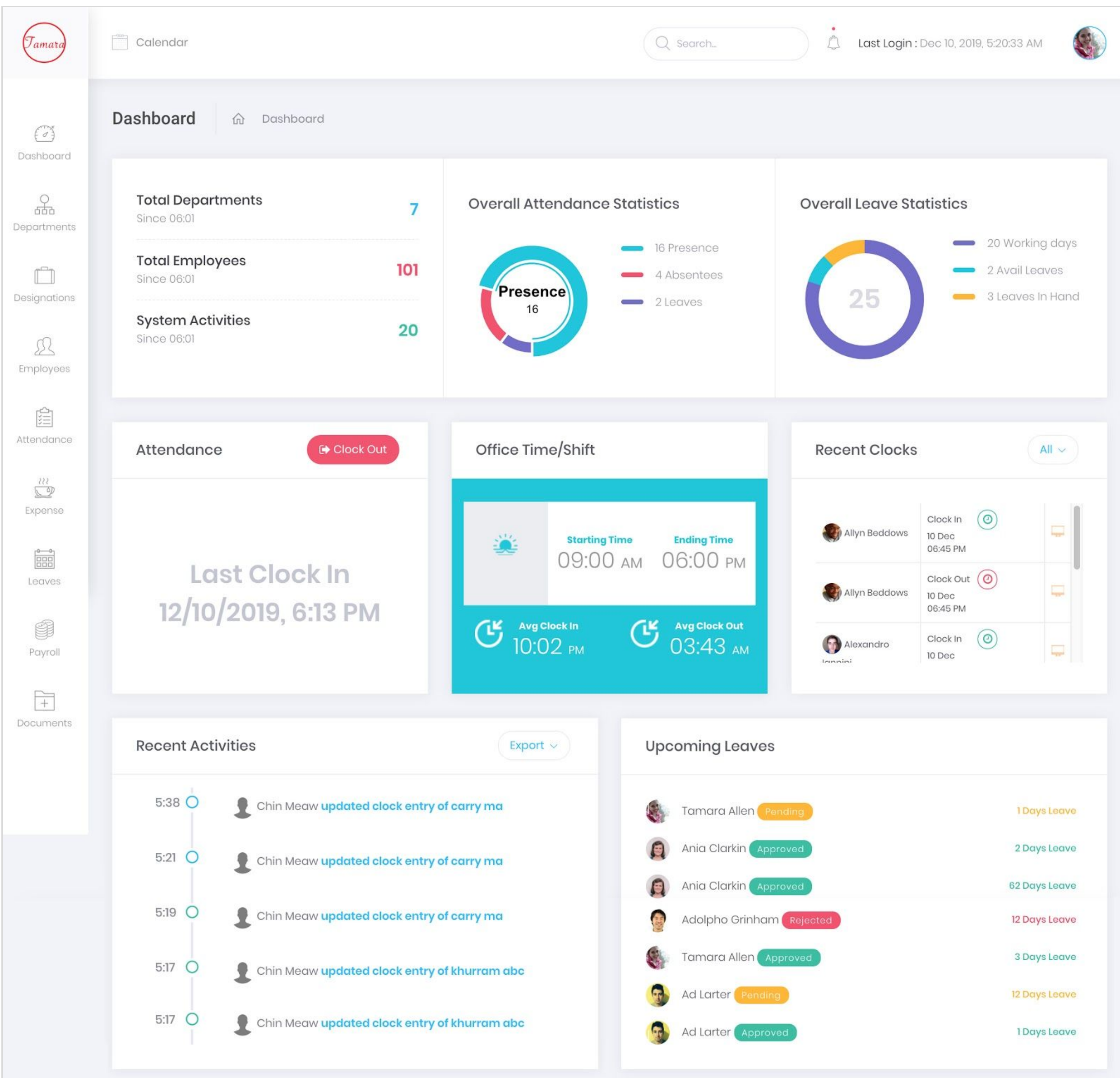
https://hk.peoplesonic.com/#/login

Please make sure you bookmark the login url address for future reference.

Dashboard

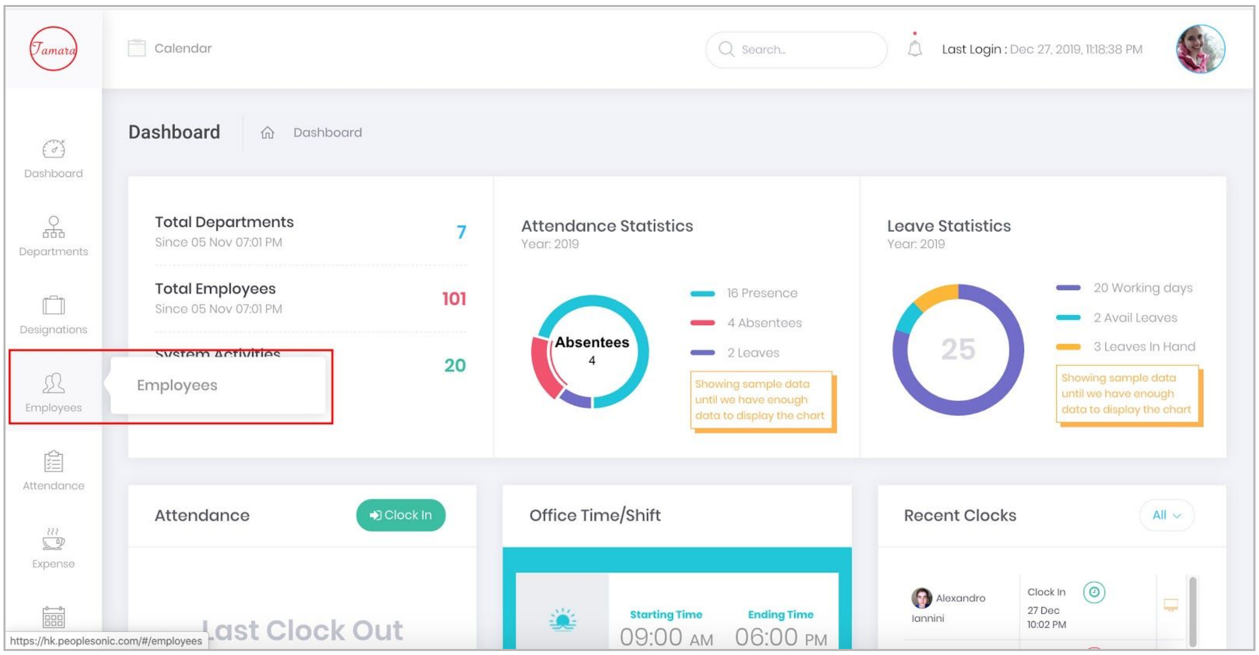
When you login with your account you will be presented with the “Dashboard” which consists of different stats in order to give you a birds eye view of the company.

The dashboard includes a left menu which will be used to access different sections of the portal. If you click on your avatar at the right top of the screen, then it will open a popup which has a profile and settings link.

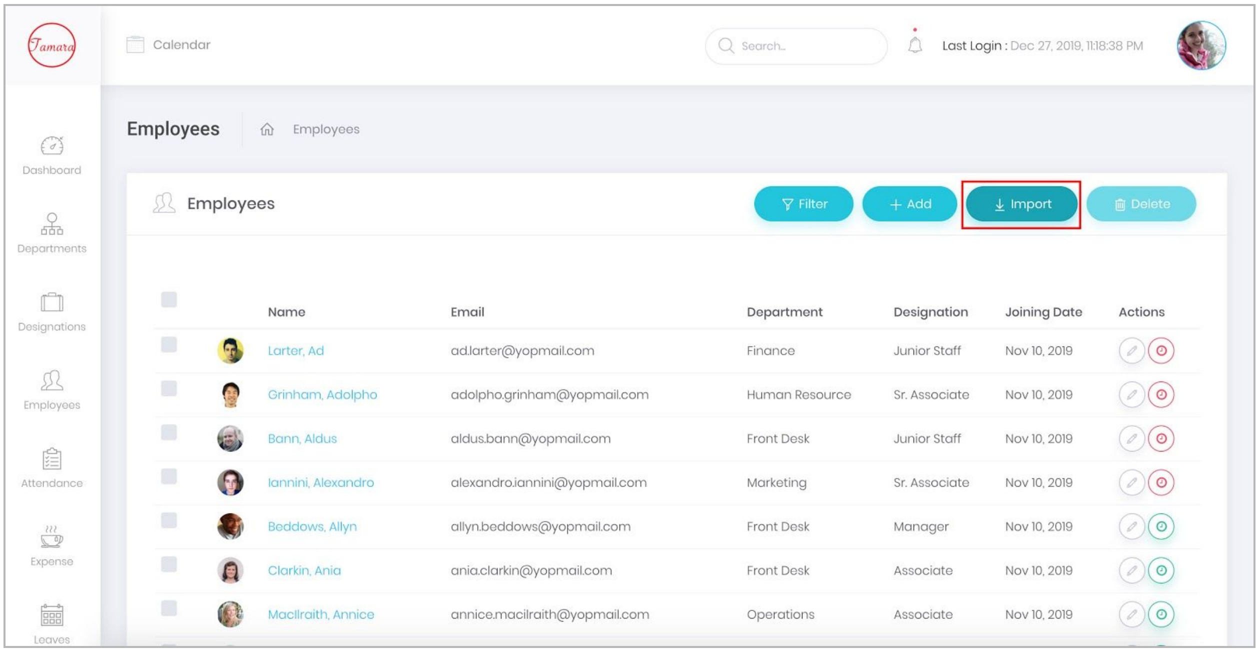


Setting up your company

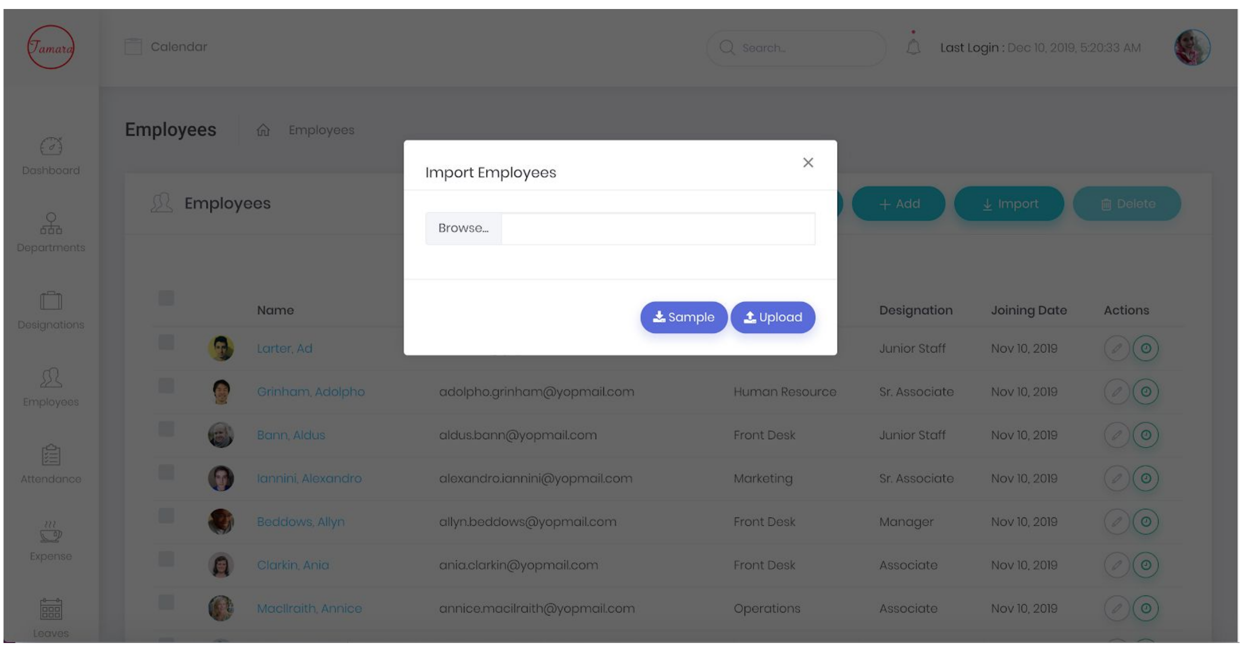
The easiest way to setup a new company is from bulk import functionality. Select the Employee section from the left menu to view the employee section.



Then click the **"import"** button at the top right corner of the panel window.

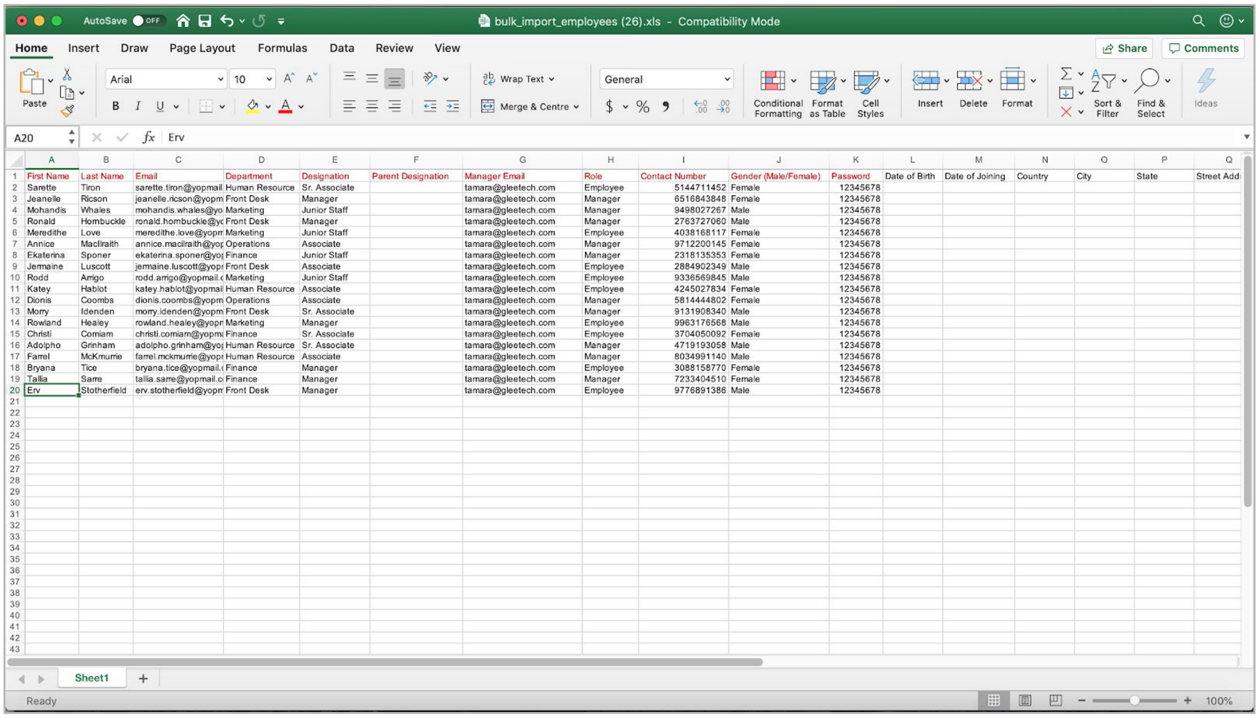


This will open a pop-up window. You can download the sample Excel file to know the required format.



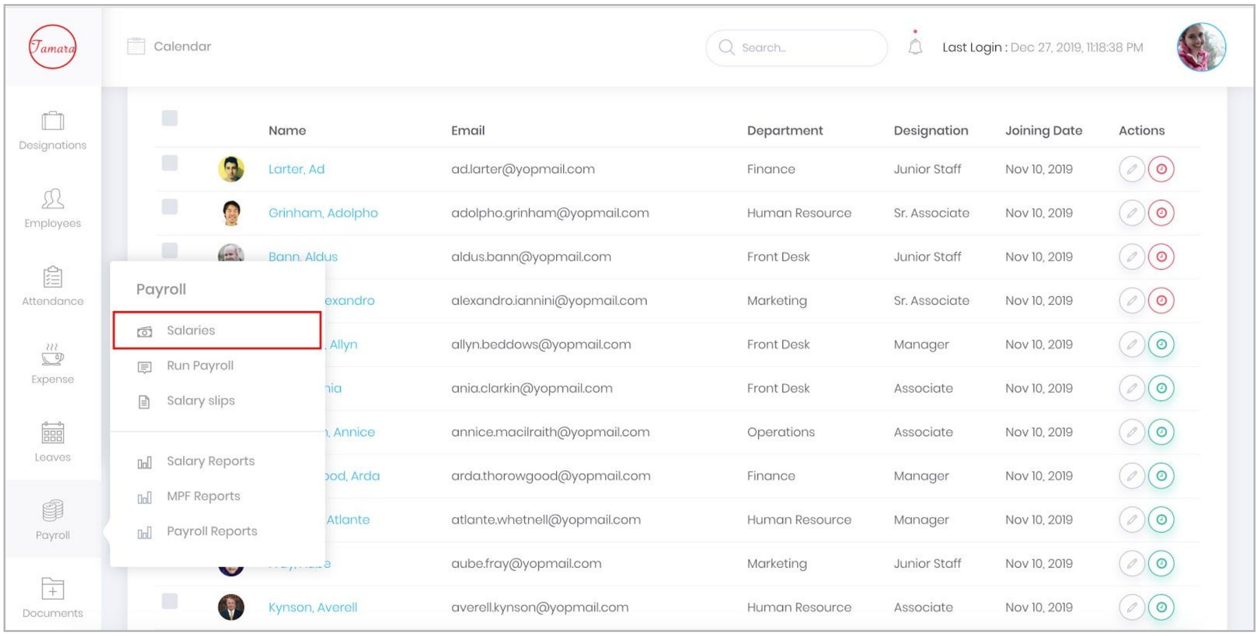
You can add your employees list along with their department, designation manager and other related information. Then upload an excel file in order to automatically create departments, designation, roles, employee managers etc.

The sample sheet when downloaded contains one example entry, which will give you an idea of how you can replicate it for your employees for bulk entry.

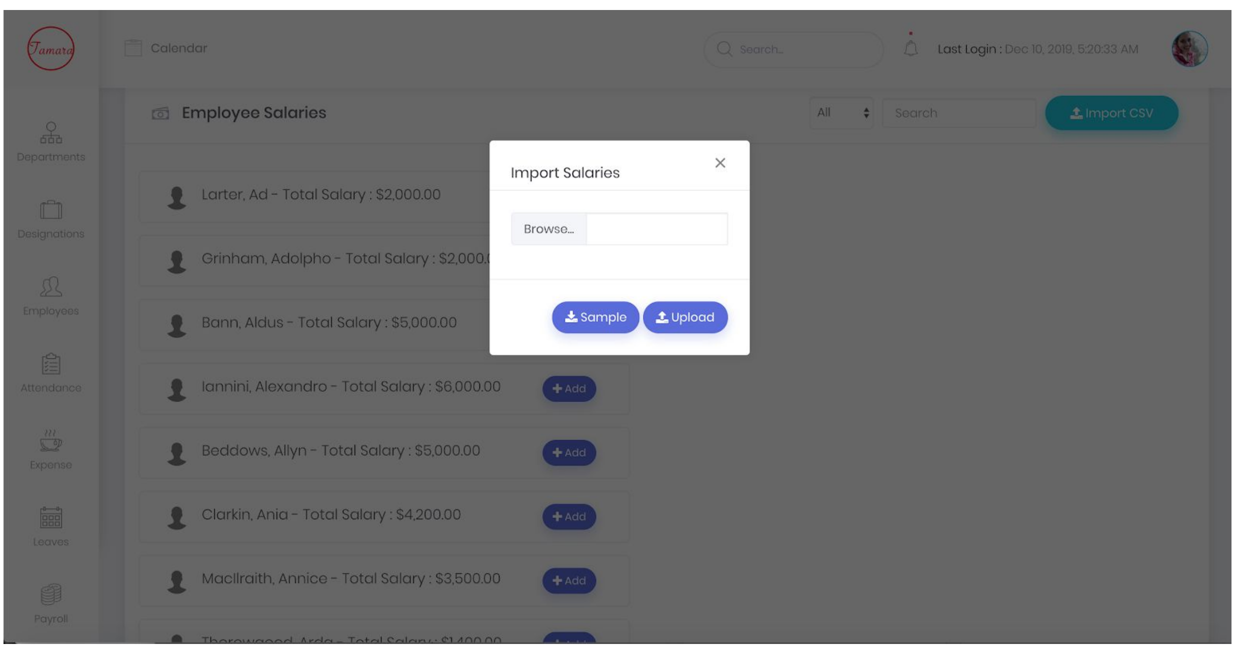


Bulk upload salaries

You can add all employee salaries by uploading a salary import function. You will need to go to the **Payroll** section from the left menu then click **Salaries** to view the salaries of all employees.

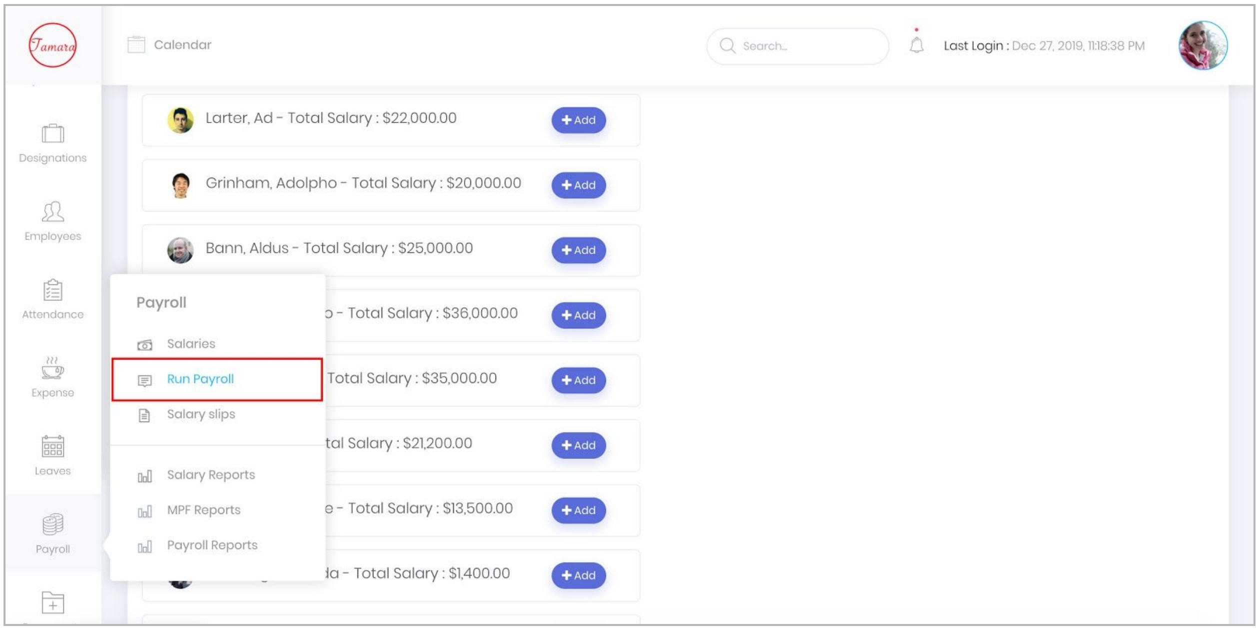


Then using the import button you can add salaries of all employees. Currently, we support three types of employee earnings: **Basic, Addition and Deduction.** You can download a sample file and modify the file accordingly in order to upload different types of employee earnings.

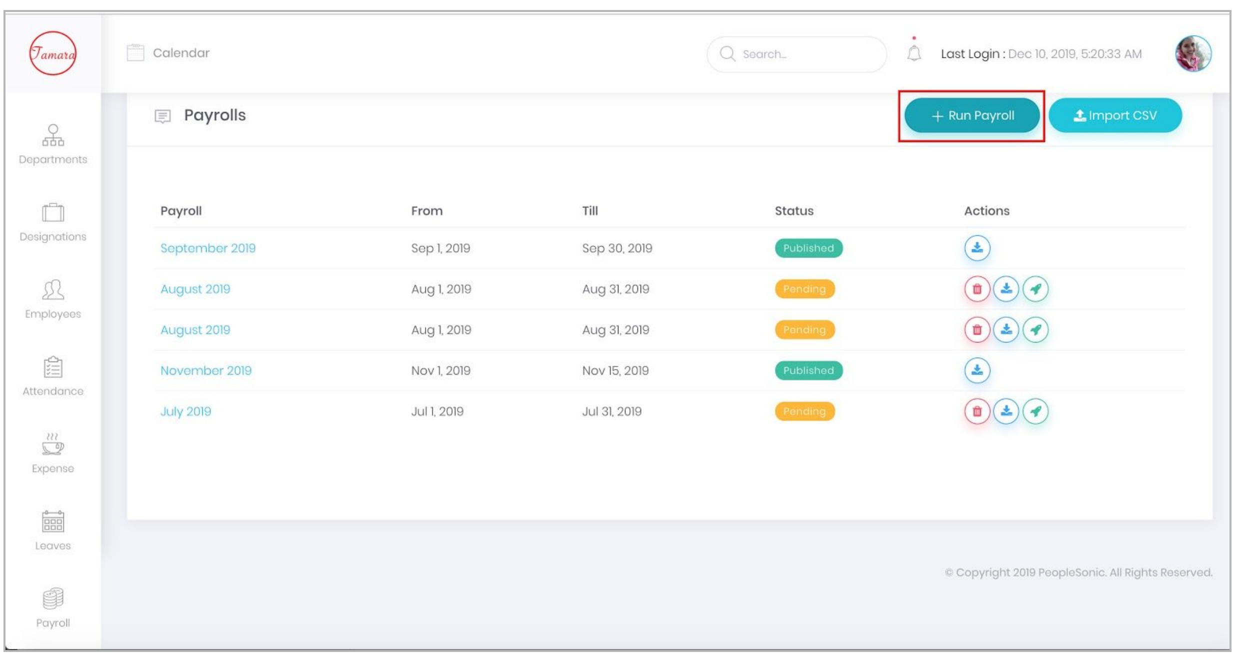


Run Payroll

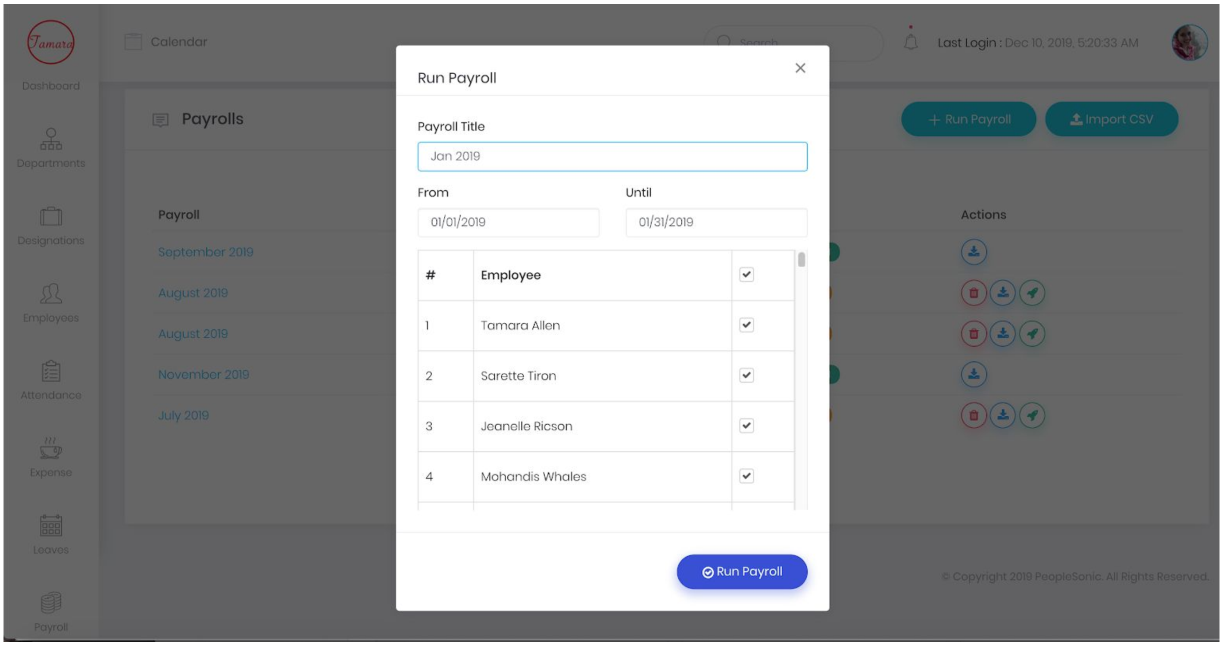
Running a payroll is simple. You can go to the Payroll section and click the **Run Payroll** button in order to view the previous payrolls.



Then click on the Run Payroll button at the top which will show you the Payroll popup screen.

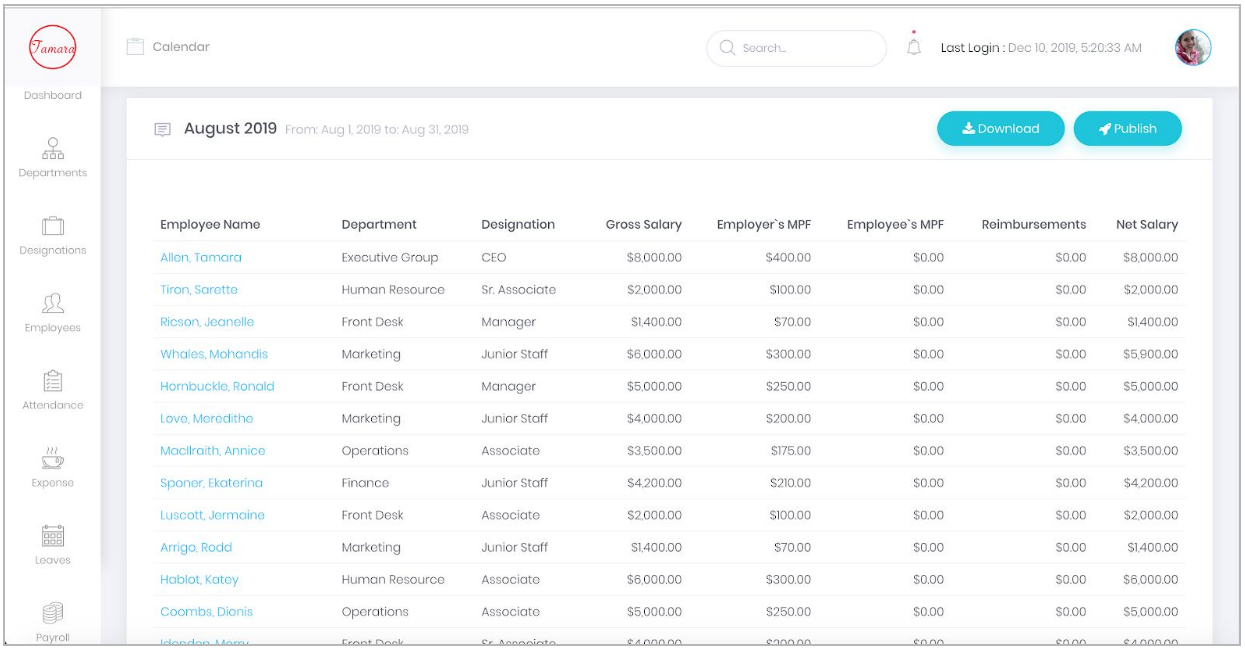


Provide the title, start date, end date of the payroll and select the employees for generating a payroll for that specific dates and selected employees.

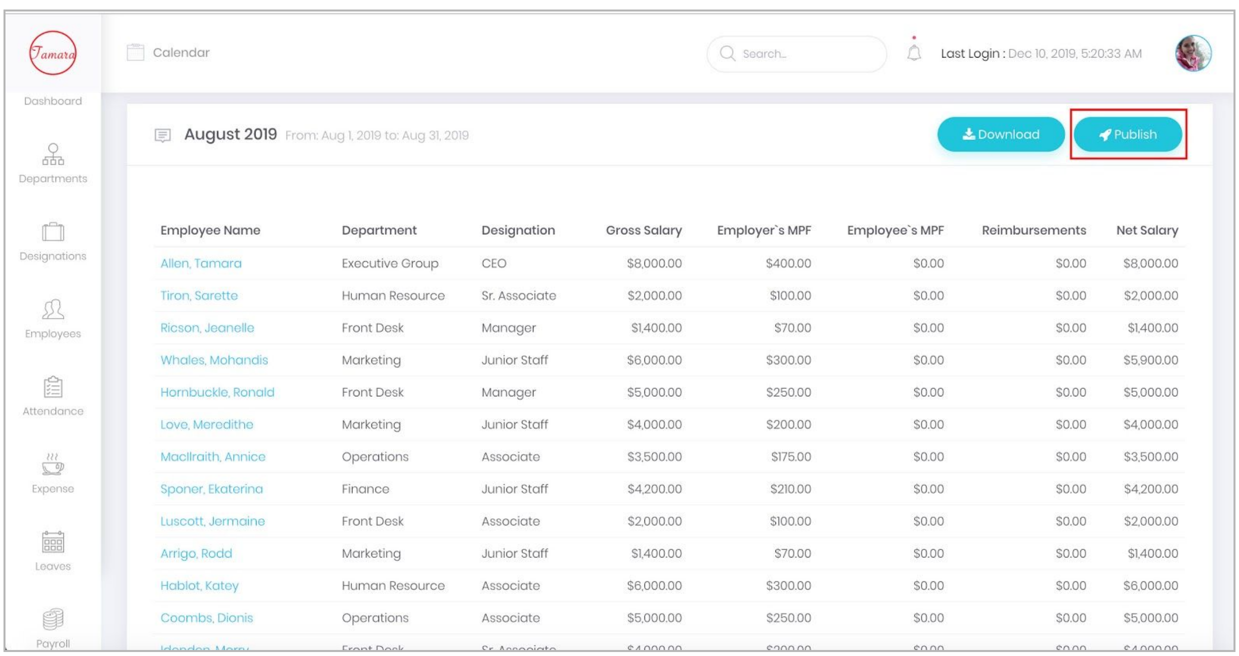


Please note, the payroll is generated but not published. You can download all the salary slips of the employees by clicking the download icon or publish the payroll by clicking on the rocket icon.

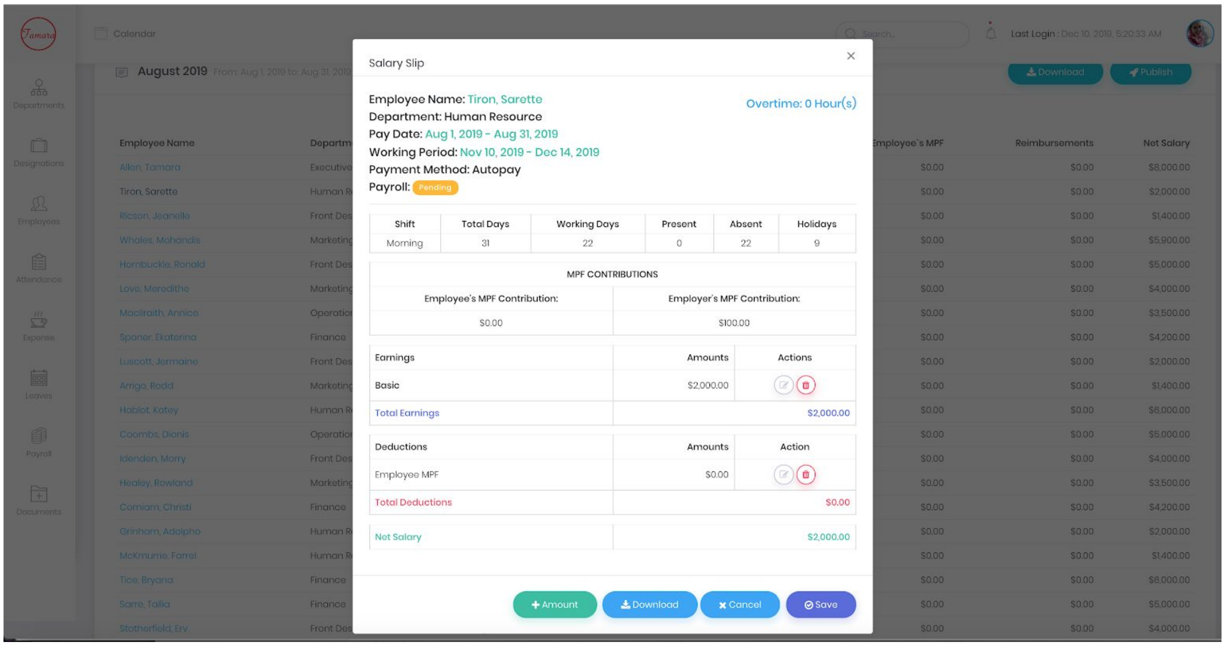
Clicking on the payroll title from the list of payrolls will show you the details of the payroll.



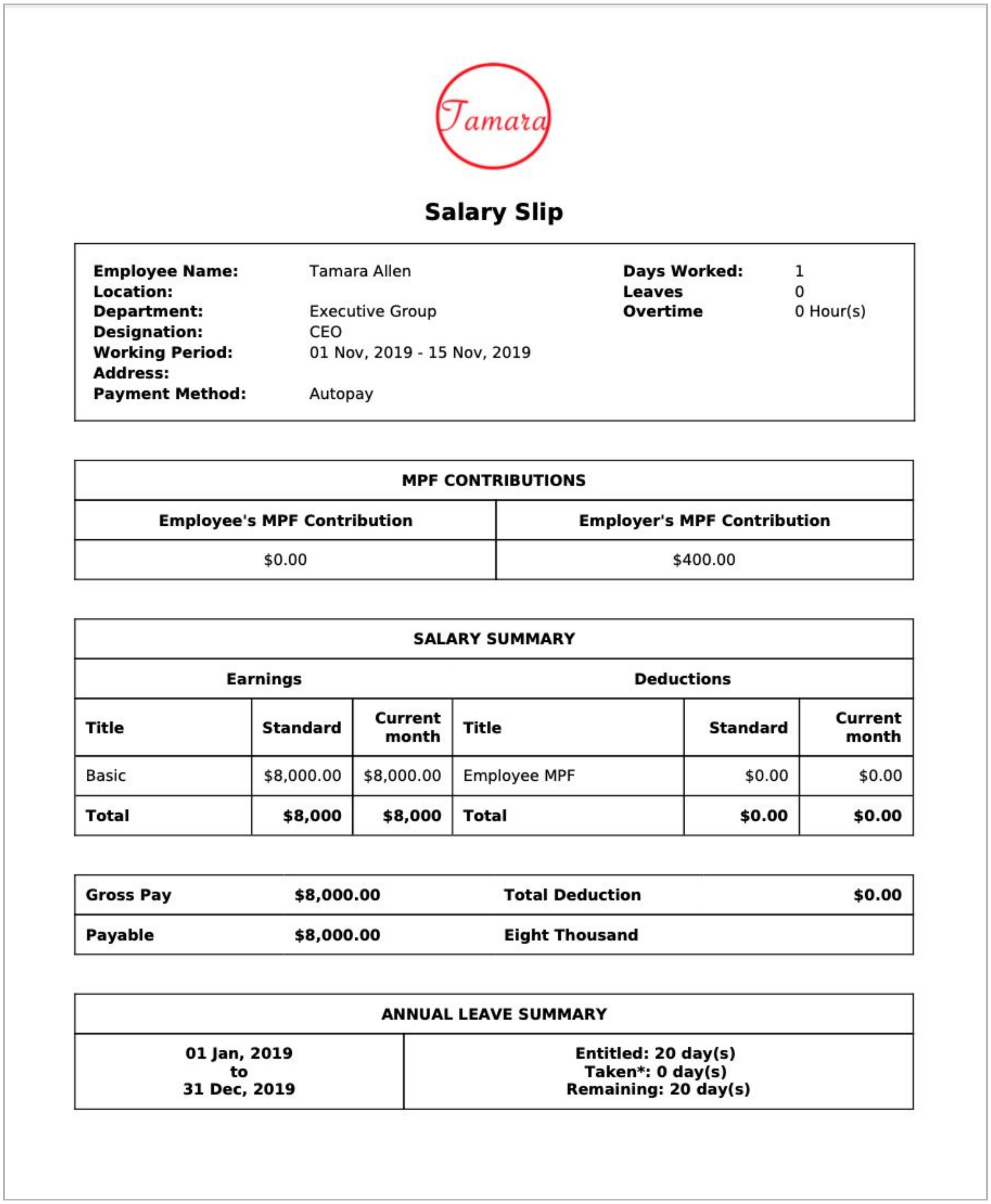
You can click the publish button to send the salary slips via emails to all the listed employees of the payroll.



In the Payroll detail page, if the payroll is not published, then you can also modify the payroll of a specific employee by clicking on the name of the employee and updating the records.



The salary slip for individual employees can be downloaded by clicking on the download button in the popup or the download icon on the Payroll detail page. The salary slip includes the company logo, employee details, salary details, MPF contributions and the leave details of an employee.



Tamara

Salary Slip

Employee Name:	Tamara Allen	**Days Worked:**	1
Location:		**Leaves**	0
Department:	Executive Group	**Overtime**	0 Hour(s)
Designation:	CEO		
Working Period:	01 Nov, 2019 - 15 Nov, 2019		
Address:			
Payment Method:	Autopay		

MPF CONTRIBUTIONS	
Employee's MPF Contribution	**Employer's MPF Contribution**
$0.00	$400.00

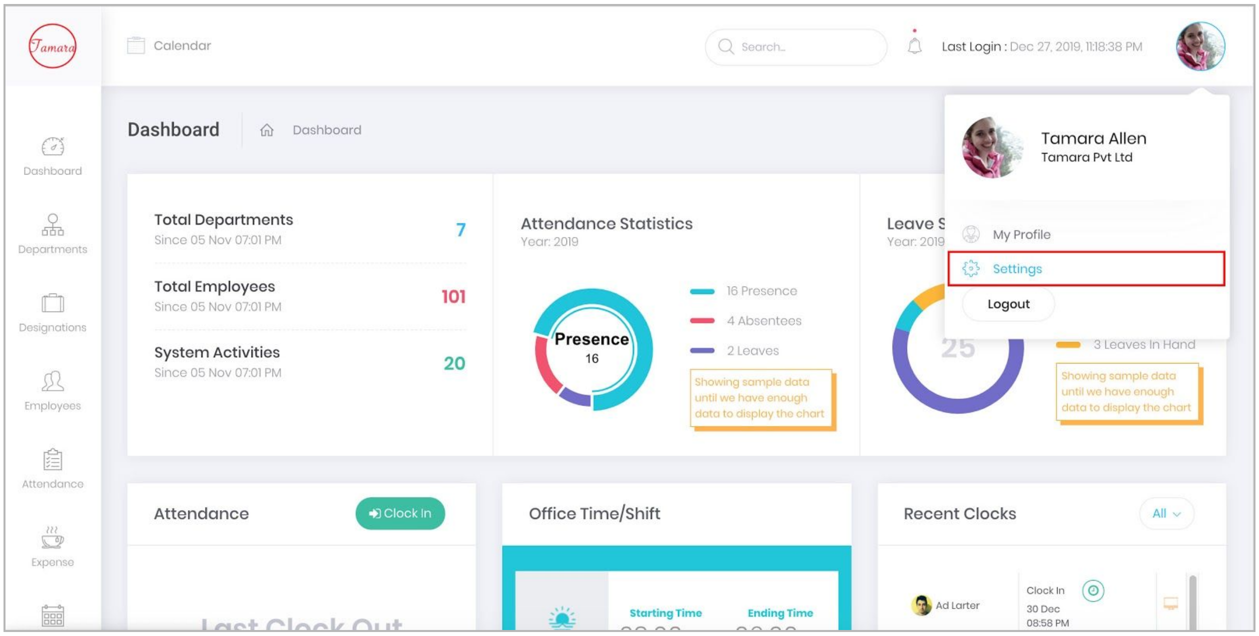
SALARY SUMMARY					
Earnings			**Deductions**		
Title	**Standard**	**Current month**	**Title**	**Standard**	**Current month**
Basic	$8,000.00	$8,000.00	Employee MPF	$0.00	$0.00
Total	**$8,000**	**$8,000**	**Total**	**$0.00**	**$0.00**

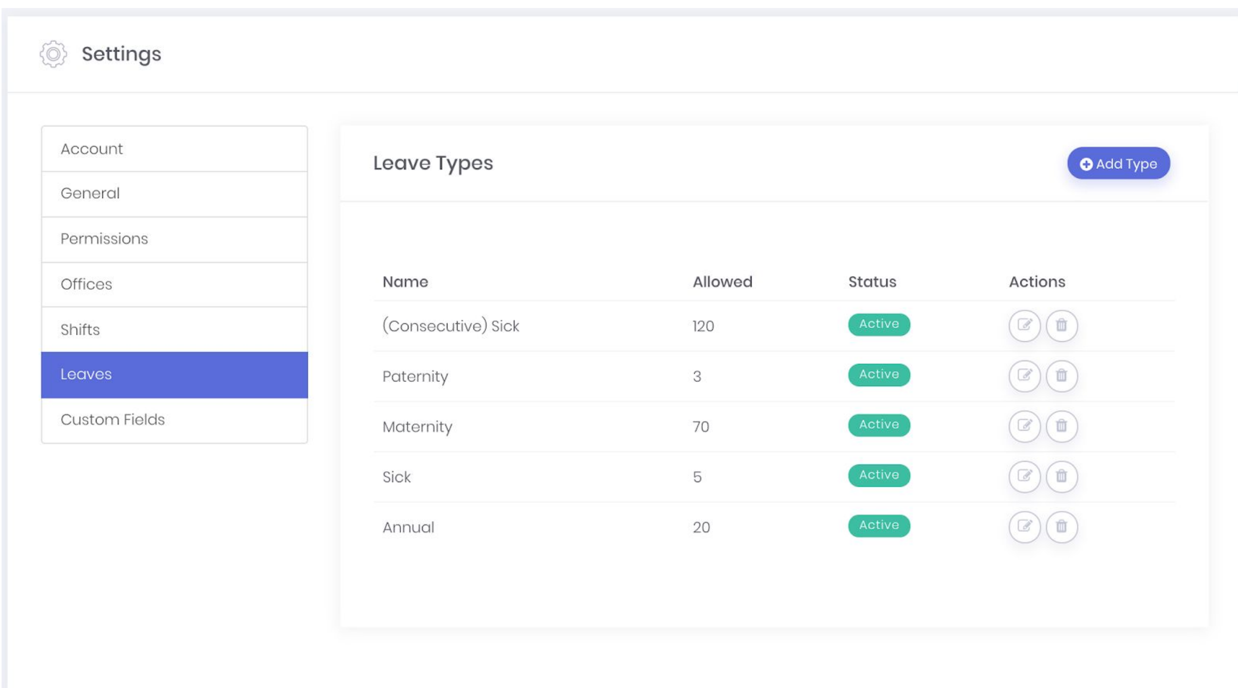
Gross Pay	**$8,000.00**	**Total Deduction**	**$0.00**
Payable	**$8,000.00**	**Eight Thousand**	

ANNUAL LEAVE SUMMARY	
01 Jan, 2019 to 31 Dec, 2019	**Entitled: 20 day(s) Taken*: 0 day(s) Remaining: 20 day(s)**

Configuring Employees Leaves

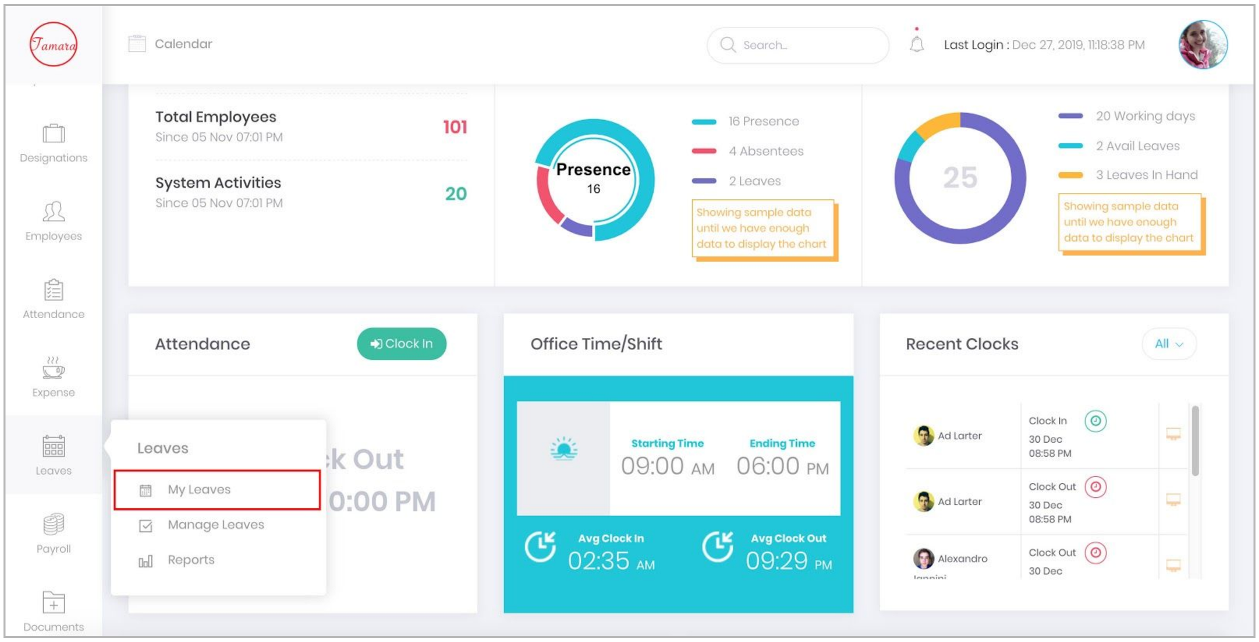
PeopleSonic has pre-configured different types of leaves according to your country labour laws. Company admin can add new type or modify the pre-configured leaves by visiting the **Setting -> Leaves section**.



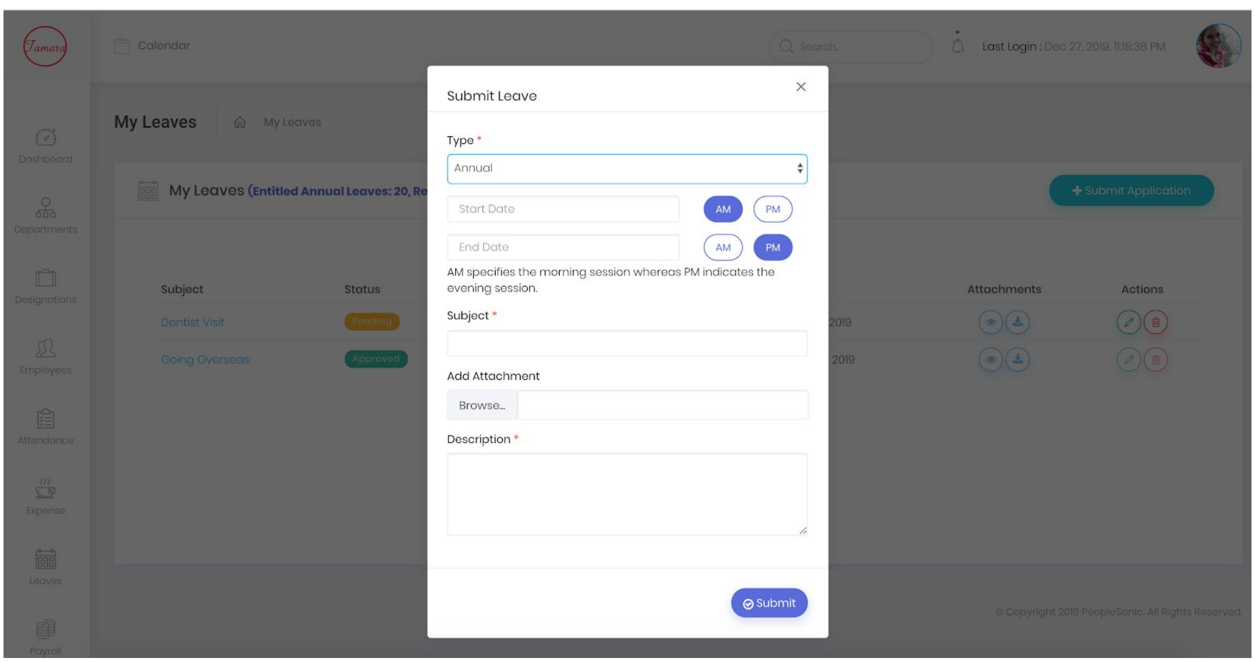


Applying for Leaves

Users can visit **Leave -> My Leaves** section to view the currently applied leaves.



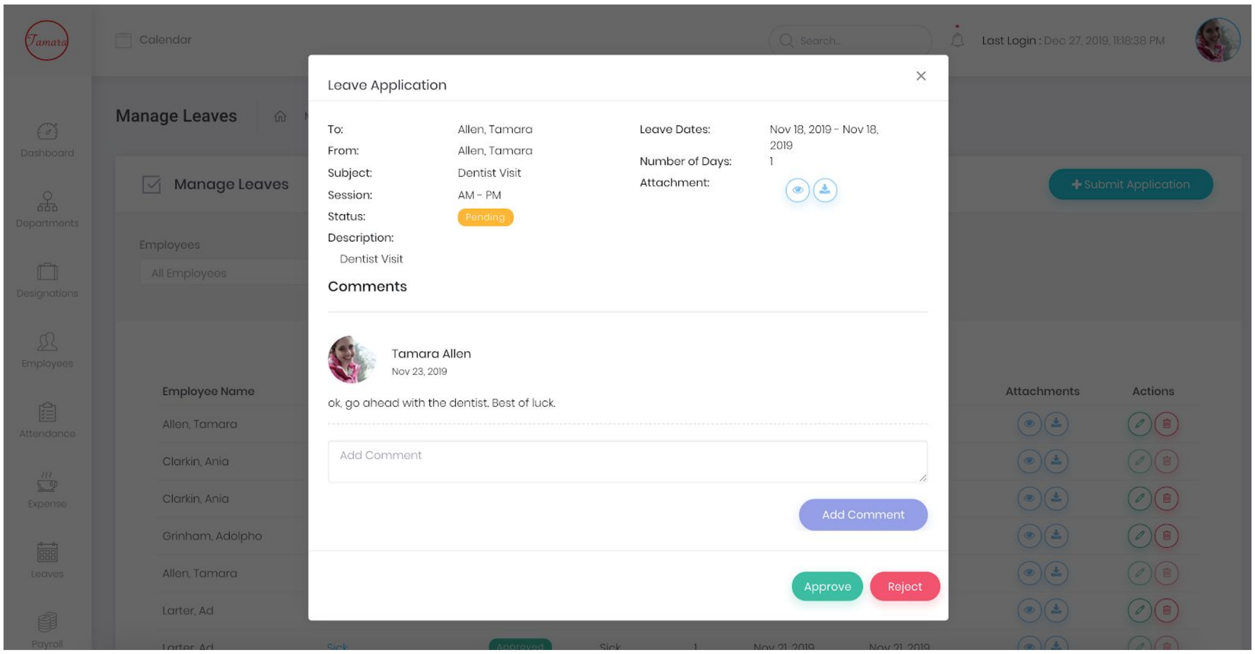
Users can submit a new leave request by clicking the submit leave button at the top right of the leave panel. Once the submit leave button is clicked, the submit leave popup is displayed where the user can add the desired leave type along with the rest of the details to submit the leave application.



If the leave type has a half day option then the user would be able to apply for the half day leave otherwise the user can only apply for the full day leave for that leave type.

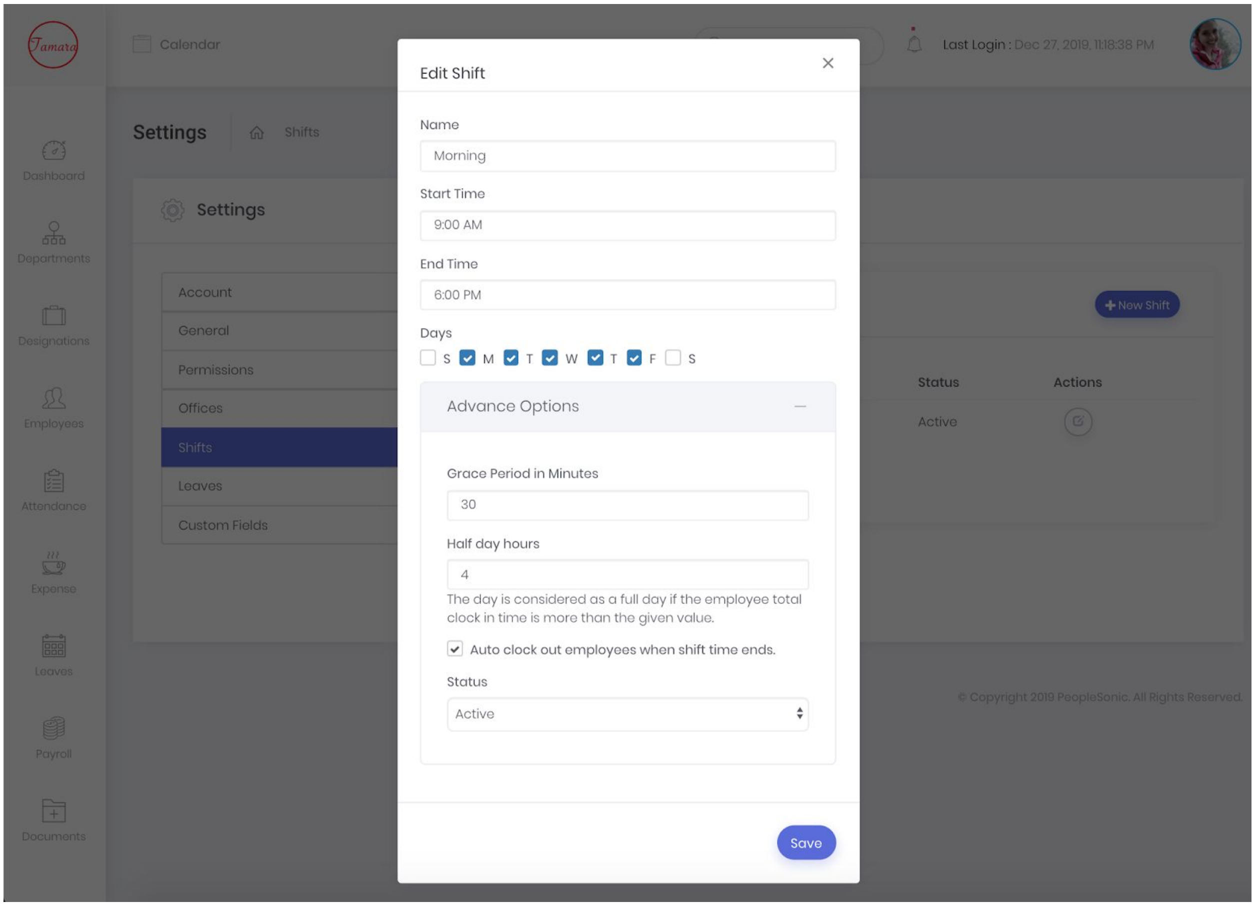
Approving Leave Request

Managers will get an email notification when there is a new leave submission from their subordinates. Then managers can visit the Leave -> Manage Leaves section to view the applied leaves from their subordinates and can approve/reject them by clicking their name and clicking the appropriate button.



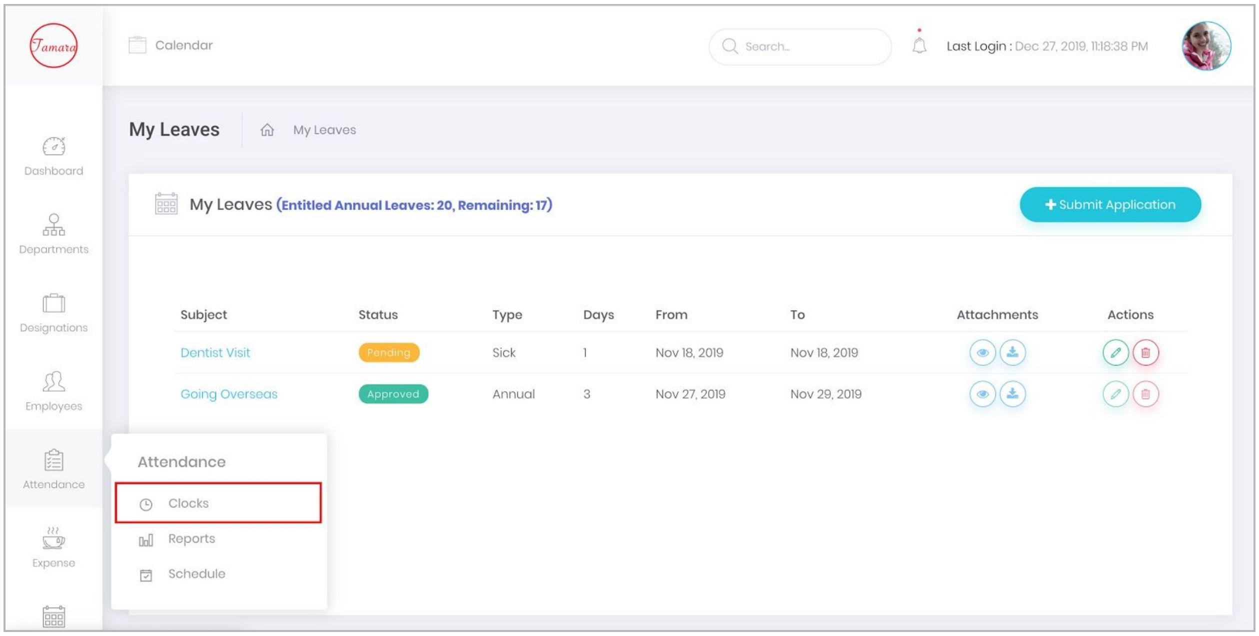
Configuring Time and Attendance

By default morning shift is configured with working hours from 9:00AM to 6:00PM from Monday to Friday. There is also a 30 minutes grace period threshold for determining if the employee was on-time or not and a 4 hours threshold to determine if the employee logged hours should be considered full day or half day. This shift is added to all employees, but the company admin can add a new shift or can modify the default shift configurations by visiting **Settings-> Shift section**.

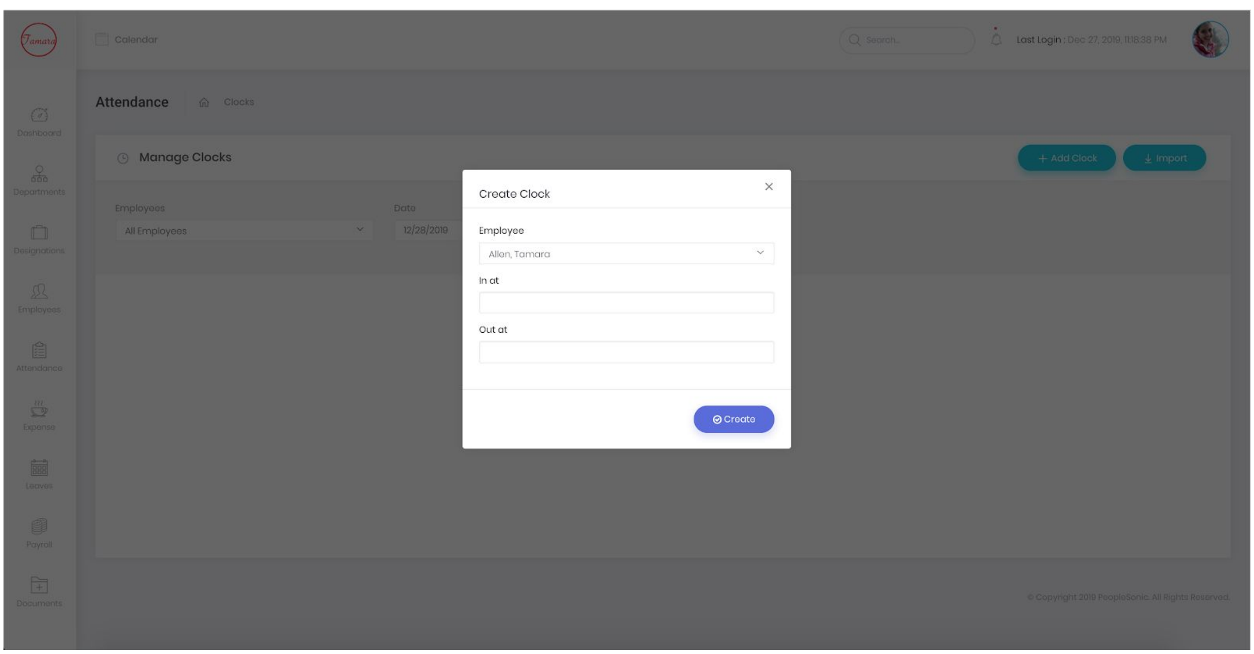


Adding Employee Attendance

There are multiple ways to add employees' attendance. The employee can login to the system and use dashboard widget to clock in/out. If the employee has permission to manually mark the attendance then the employee can visit **Attendance -> Clocks** and manually add the clock in/out record for his attendance.

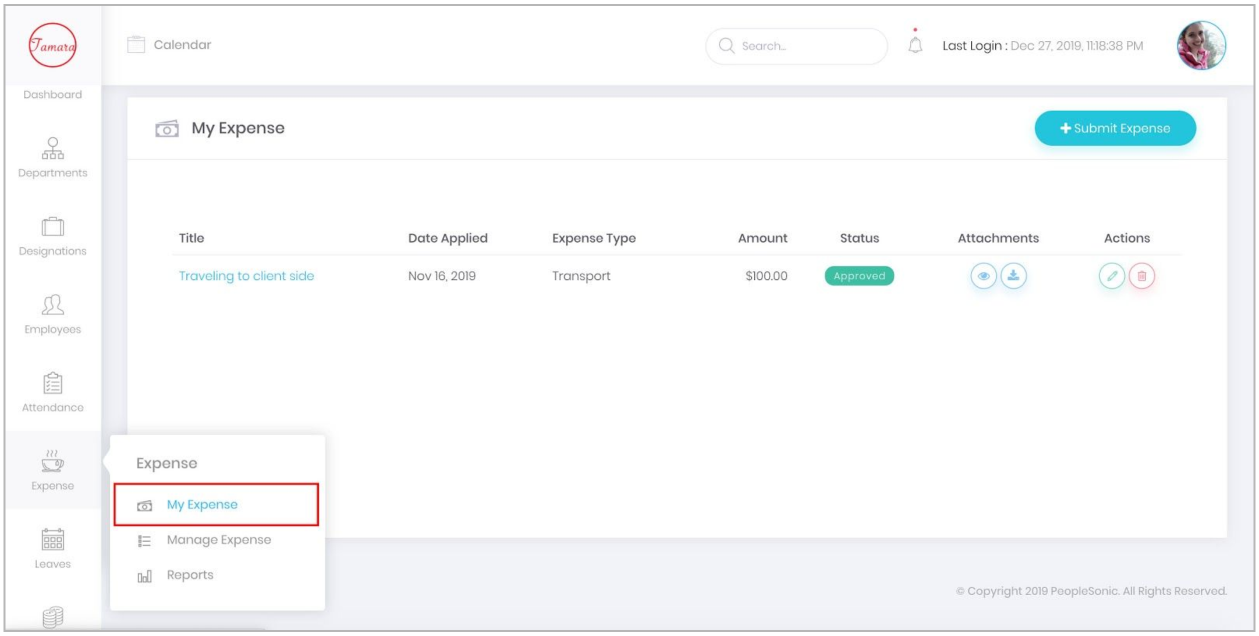


The employees' manager can also manually mark the attendance of the subordinates by visiting Attendance -> Clocks and clocking on Add clock.

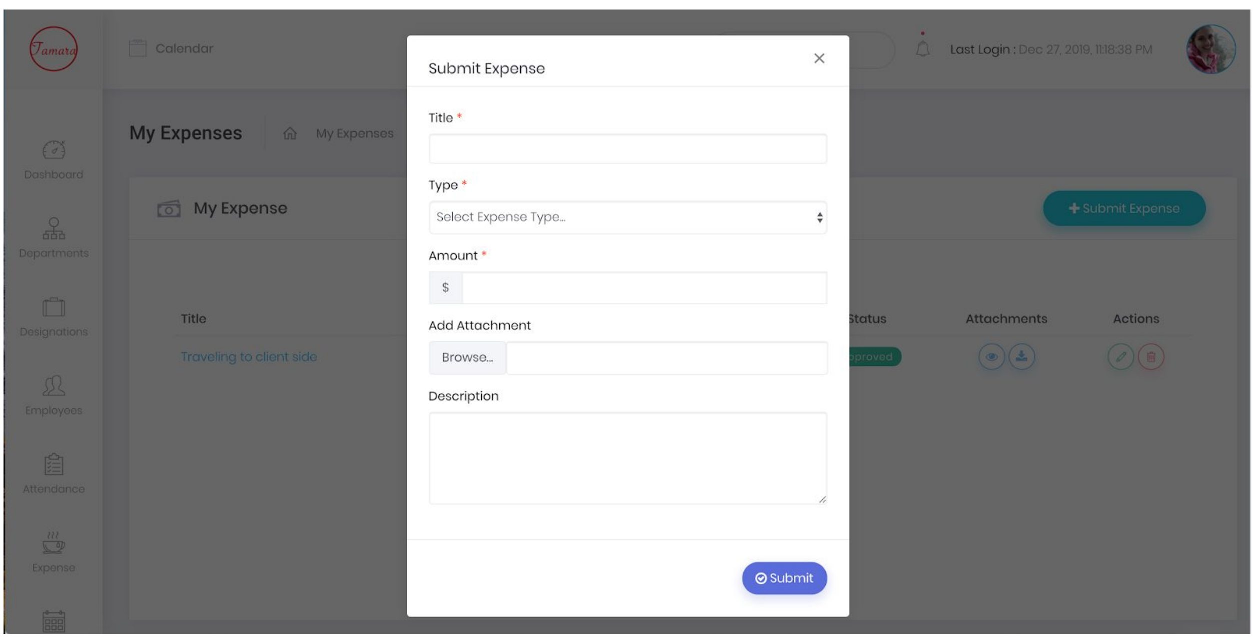


Applying for Expenses

Users can visit **Expense -> My Expense** section to view the currently applied expenses.

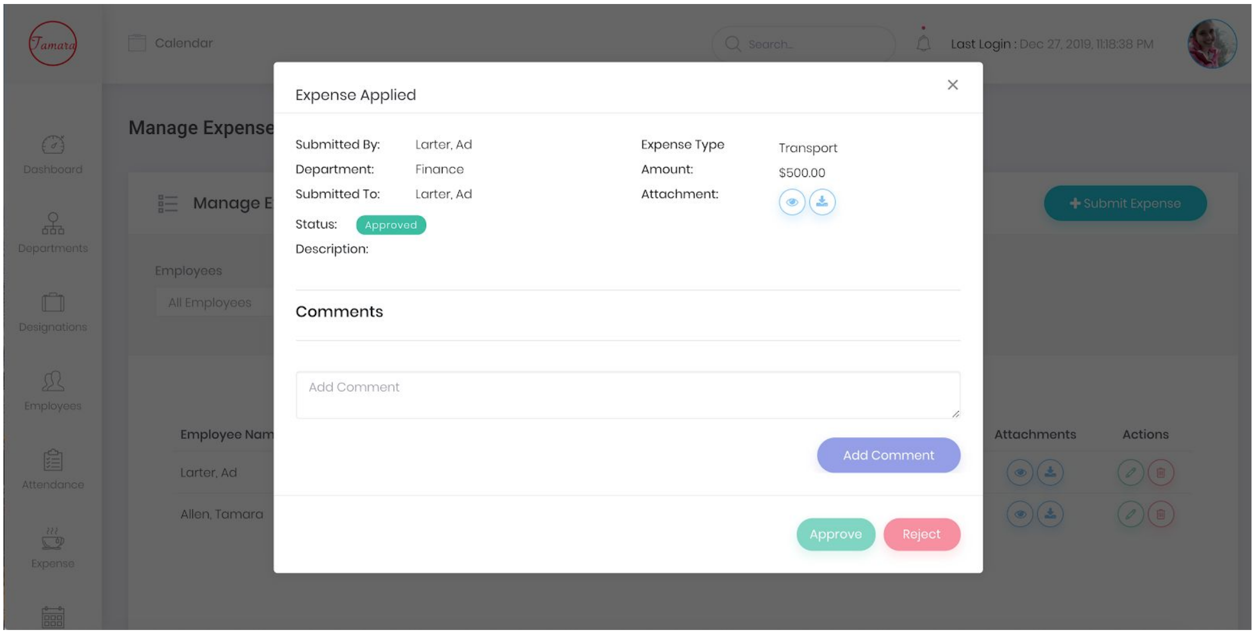


Users can submit a new expense request by clicking the submit expense button at the top right of the screen. Once the submit expense button is clicked, the submit expense popup is displayed where the user can add the desired expense type along with the rest of the details to submit the expense claim.



Approving Expense Requests

Managers will get an email notification when there is a new expense submission from their subordinates. Then managers can visit the **Expense -> Manage Expense** section to view the applied expense from their subordinates and can approve/reject them by clicking their name and clicking the appropriate button.



Once the expense is approved it is added as an reimbursement in the employee payroll.

Dashboard Details

The interface has been tailored to make sure that customers can get the information they require in the shortest time and without any hassle. The side bar consists of the following menus:

i. Dashboard
ii. Departments
iii. Designation
iv. Employees
v. Attendance
vi. Leaves
vii. Payroll
viii. Documents

Dashboard

Dashboard is your recent activity log, where you will be presented with recent changes within your company and employees. It is divided into different sections, each presenting you with overall stats for that said department.

The Dashboard shows the following overall stats:

Over All Company Stats

This section will give you the overview of your current total number of Departments, Employees and System Activities.

Overall Attendance Statistics

At the start it will display a sample of attendance. With time as you add your employees, and they add their attendance it will be updated accordingly with your company stats.

Overall Leave Statistics

At the start it will display a sample of leave statistics. With time as you add your employees, and they apply for leaves, it will be updated accordingly with your company stats.

Attendance

This section will be filled with the attendance clocked by your employees.

Office/Time Shift

This is the area where office shifts timings are displayed. You can set them up in the settings, you can even have two shifts if you so desire for your company.

Recent Clocks

This area will be filled with your employees check ins from there systems through there logins. Clocks are of two types that is; time of arrival and time of leaving the office.

Recent Activities

This area will be filled with recent changes within your organization.

Upcoming Leaves

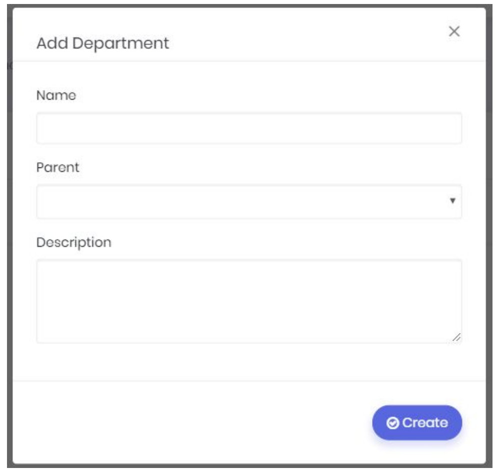
This section will be filled with the applied leaves by your employees for you to review.

Departments

Departments is the area where you will have the option to define your company structure according to your requirements. You will have full control over the settings of any department, as well as assigning employees and delegating admin rights of each department to a specific admin with admin rights.

a) Add Department

To add a department for your organization, just click on the "Add Department" blue colored button at the top right side. This will open up a pop-up window where you will have the option to fill the relevant information to create the department.



Designation

Designation is the area where you will have the option to define your company designation structure according to your requirements. You will have the option to assign any designation to employees when you add them through the Employee section.

Add Designation

To add a designation for your employees, just click on the "Add Designation" blue colored button at the top right side. This will open up a pop-up window where you will have the option to fill relevant information to create the designation

Employees

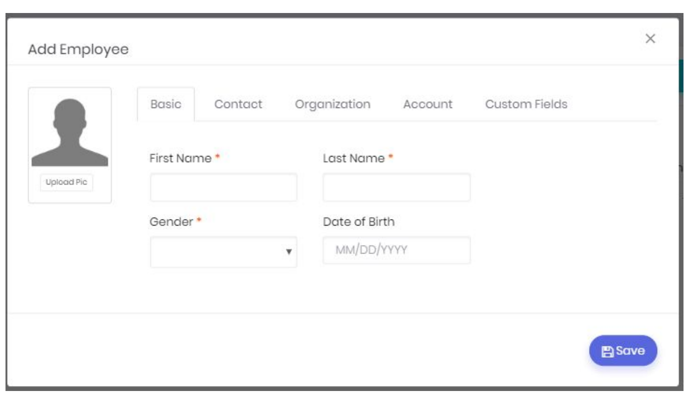
Employee is the area where you will have the option to add your company employees according to your requirements. You will have the option to add descriptions, assign departments, and assign designations to your employees within this area. You will be able to see all the employees currently added to your company here. At the top right side, you will have four buttons: Filter, Add, Import and delete

Filter

Filter button when clicked will open a pop-up window, that will have options to sort out the list of employees by Gender, Department, Designation or Employee status.

Add:

Add button when clicked will open a pop-up window, that will have subsections that you have the option to fill accordingly. The areas with a red "*" are mandatory and will not let you add an employee if you don't fill it.



You can upload the current employee picture by clicking on the “Upload Pic” button under the picture frame. That will prompt a separate popup window for you to select a picture from your computer to upload to the system.

The sub-sections in the Add Employee are

Custom Field

This area is reserved for more custom modifications requested by your company if needed. All the custom options will show up here for employees that you will request.

Bulk Import Employees

The “Import” button at the top right corner, is a quick way for you to add bulk employees through. When the button is clicked a pop-up, a window appears where you can download a sample Microsoft Excel file, and upload your own after adding data into the excel sheet.

The sample sheet when downloaded contains one example entry, which will give you an idea of how you can replicate it for your employees for bulk entry.

Once you have filled the excel sheet with your employee’s data, click on the “Browse” button under “Import Employees” this will let you browse the file from your computer, once selected click on “Upload” button to create bulk users for your company.