

# Company Setup GUIDE

Setting up your organization in Synclo is designed to be quick and straightforward. The onboarding wizard walks you through a structured setup process so your company can begin operating immediately.

This guide explains each step of the onboarding process and shows where screenshots should be placed when documenting the workflow.

1.

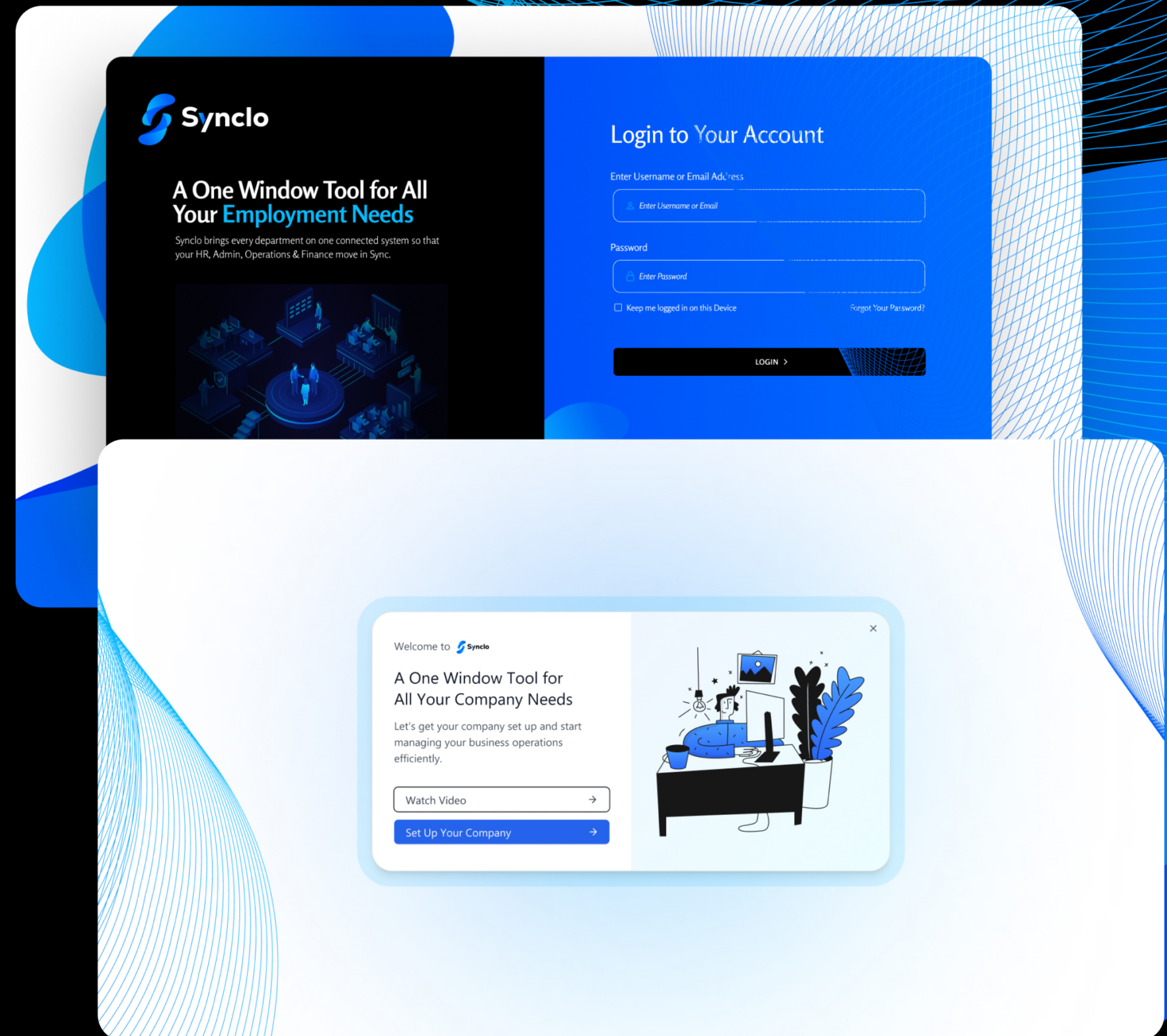
# Login and Launch the Onboarding Wizard

After logging into Synclo for the first time, the system automatically launches a guided onboarding wizard.

The wizard walks you through the required configuration steps in sequence to ensure your company is properly configured.

## Steps:

- Log into your Synclo account
- The onboarding wizard appears automatically
- Each setup stage is displayed as a guided step



2.

# Company Setup

The first step in onboarding is setting up your company details.

Information configured in this step includes:

- Company Name
- Currency
- Time Zone
- Organizational structure settings

These settings determine how time, financial data, and reporting will work across the system.

The screenshot shows a web application interface for 'Company Onboarding'. At the top, there's a search bar for employees and navigation buttons for 'Mark Break' and 'Check-In'. The main heading is 'Company Onboarding' with a sub-heading 'Complete the setup to start using your Synco'. A progress bar indicates five steps: 1. Company Setup (active), 2. Admin Profile, 3. Attendance Settings, 4. Finance Setup, and 5. Payroll Setup. Below the progress bar are three main sections: 'Company Information' (selected), 'Departments', and 'Grades & Designations'. The 'Company Information' section is titled 'Basic Details' and contains the following fields:

- Company Name \***: Demo Company (with a note: 'This was set during registration')
- Company Website**: https://www.yourcompany.com (with a note: 'Enter website URL and click -- to fetch logo automatically')
- Country \***: Select country (dropdown)
- State/Province**: Select country first (dropdown)
- City**: Select state first (dropdown)
- Street Address \***: 123 Business Street
- Zip/Postal Code**: 12345
- Official Phone Number \***: 234 567 8900
- Company Email Address \***: contact@company.com
- Company Logo**: (empty field)

3.

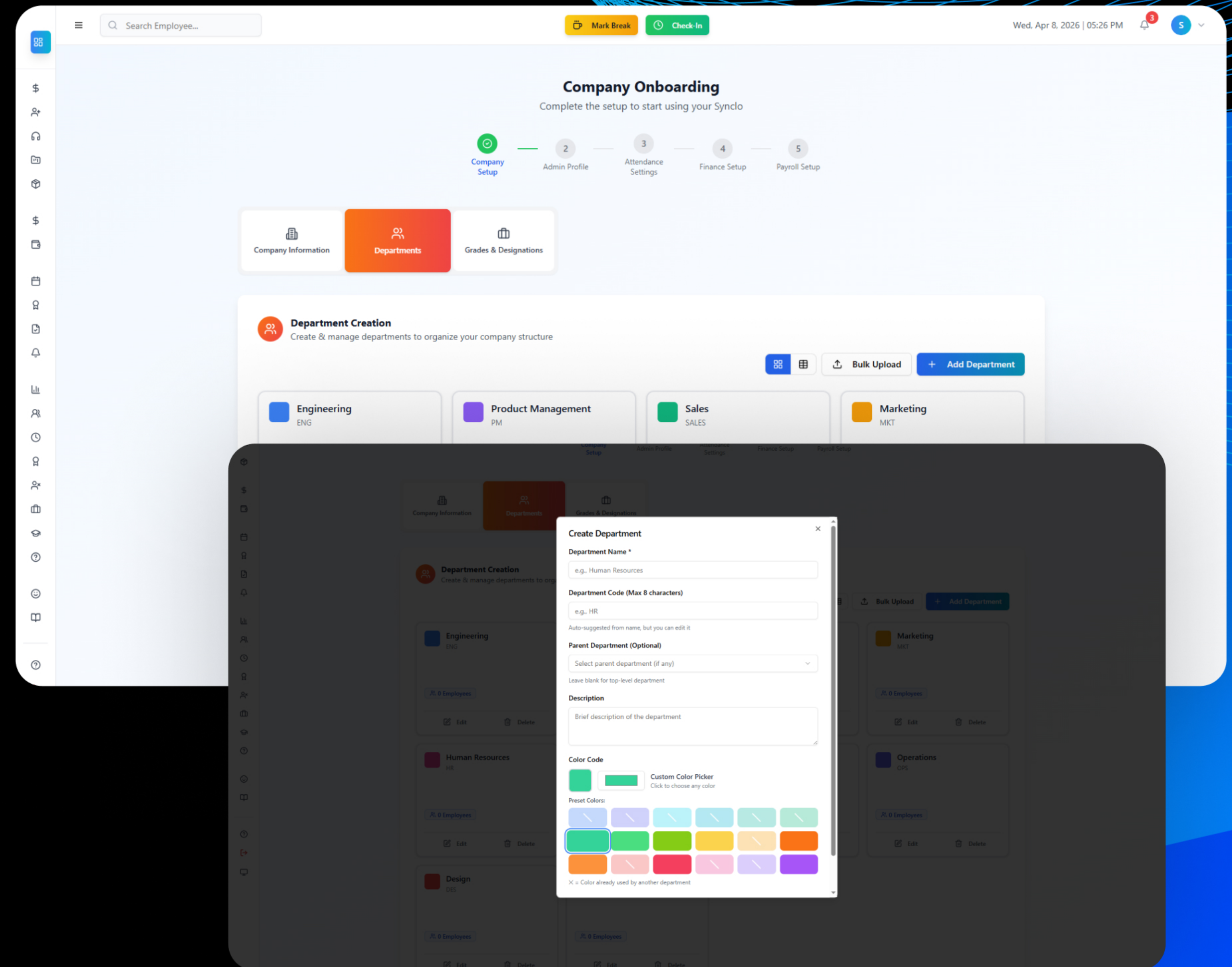
# Organizational Structure Customization

Synclo includes default organizational components that you can use immediately or customize according to your company structure.

## Available configurations:

- Departments
- Designations
- System defaults
- Employee grades (optional)

You may edit existing departments, create new ones, or enable grading systems depending on your organization's hierarchy.



4.

# Admin Profile Setup

Next, create the Admin Profile. This profile becomes the first employee in the system and is typically the system administrator.

## Information required:

- Full Name
- Email Address
- Contact Details
- Access Permissions

Once completed, this admin account will have full system access to configure additional settings and manage employees.

The screenshot displays the 'Company Onboarding' interface. At the top, there's a search bar and navigation buttons for 'Mark Break' and 'Check-In'. The main heading is 'Company Onboarding' with the subtext 'Complete the setup to start using your Synco'. A progress indicator shows five steps: 1. Company Setup, 2. Admin Profile (highlighted), 3. Attendance Settings, 4. Finance Setup, and 5. Payroll Setup. The 'Admin Profile' section is titled 'Complete Your Admin Profile' and includes the instruction 'Add yourself to the employee database'. It contains two main sections: 'Personal Information' and 'Employment Information'. The 'Personal Information' section includes fields for Full Name (with 'Demo User' entered), Personal Email Address (with 'personal@email.com' entered), Phone (with a dropdown for 'Code' and a text field for 'Phone number'), Date of Birth (with a date picker), and Gender (with a dropdown menu). The 'Employment Information' section includes fields for Department (with a dropdown), Grade (with a dropdown and the instruction 'Select department first'), Designation (with a dropdown and the instruction 'Select designation'), Reporting Authority (with a search field), Date of Joining (with a date picker), and Employment Type (with a dropdown menu).

5.

# Attendance Setup

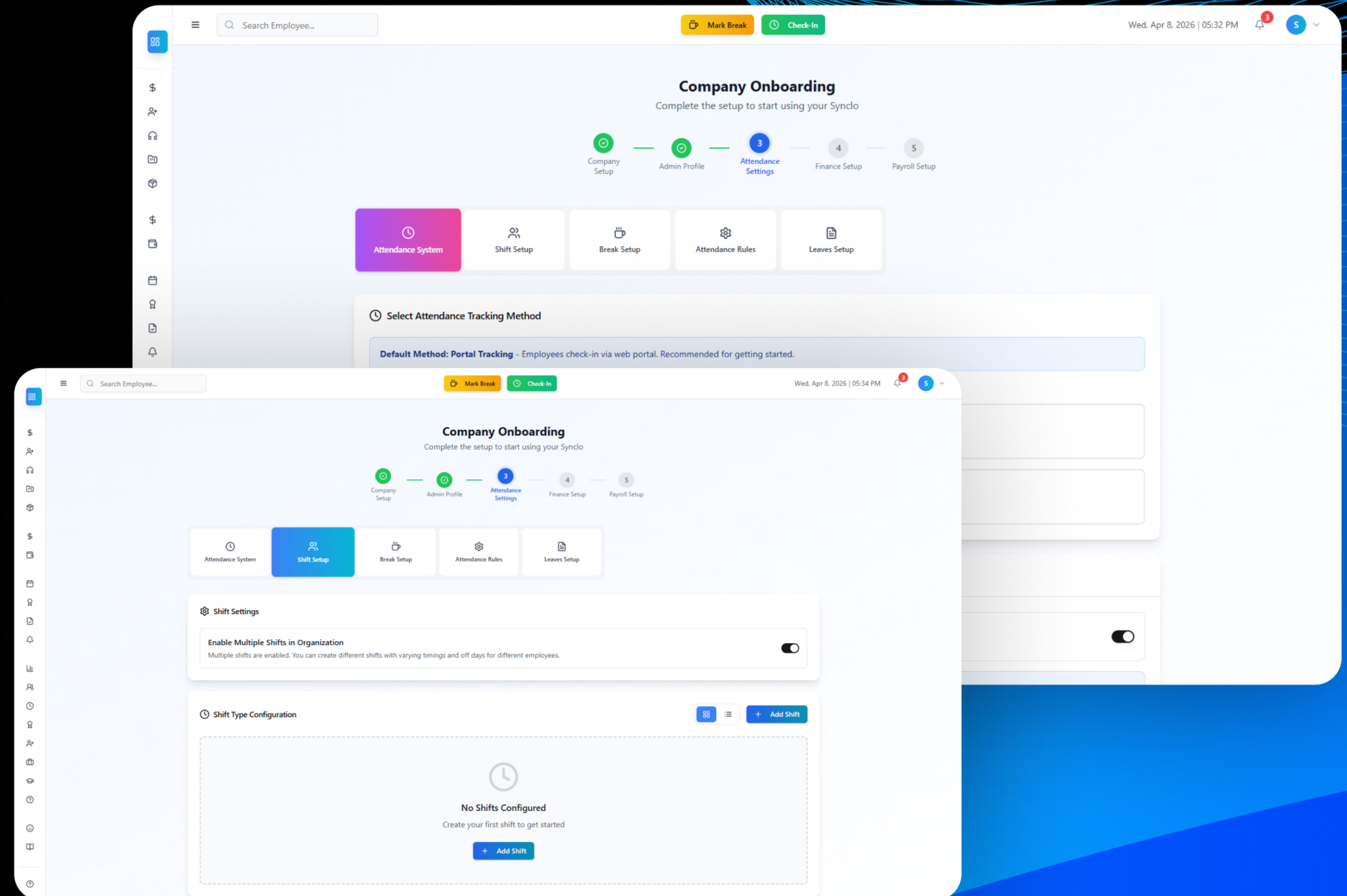
Attendance settings define how employee attendance is recorded.

Synclo supports multiple attendance methods:

- Manual attendance
- Portal-based attendance
- Biometric device integration
- Hybrid attendance models

You can also configure:

- Work shifts
- Break tracking
- Global attendance policies



6.

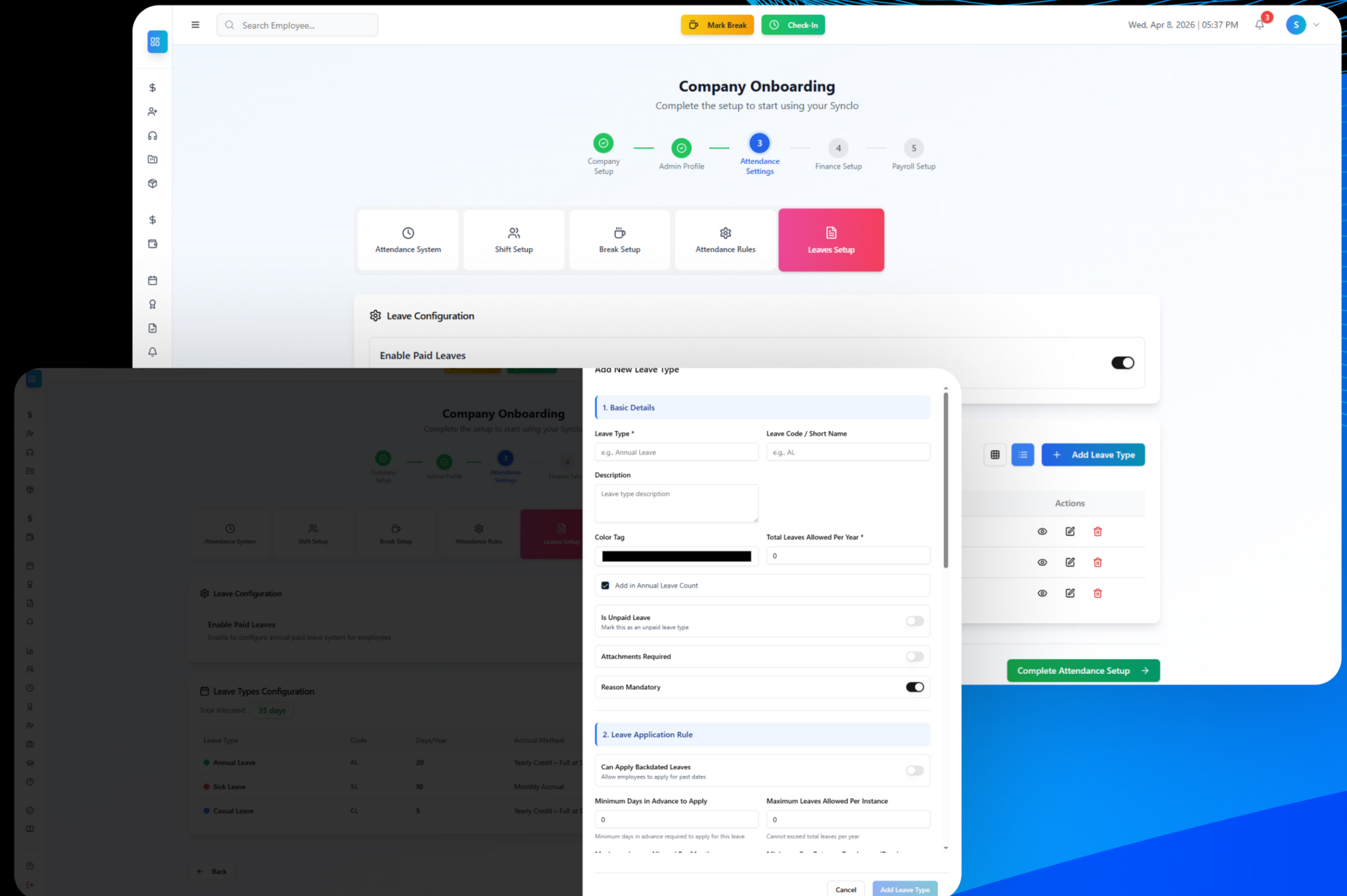
# Leave Types Setup

Synclo provides default leave types that organizations can use immediately.

Examples include:

- Casual Leave
- Sick Leave
- Annual Leave

You may modify these defaults or create custom leave types based on company policies.



7.

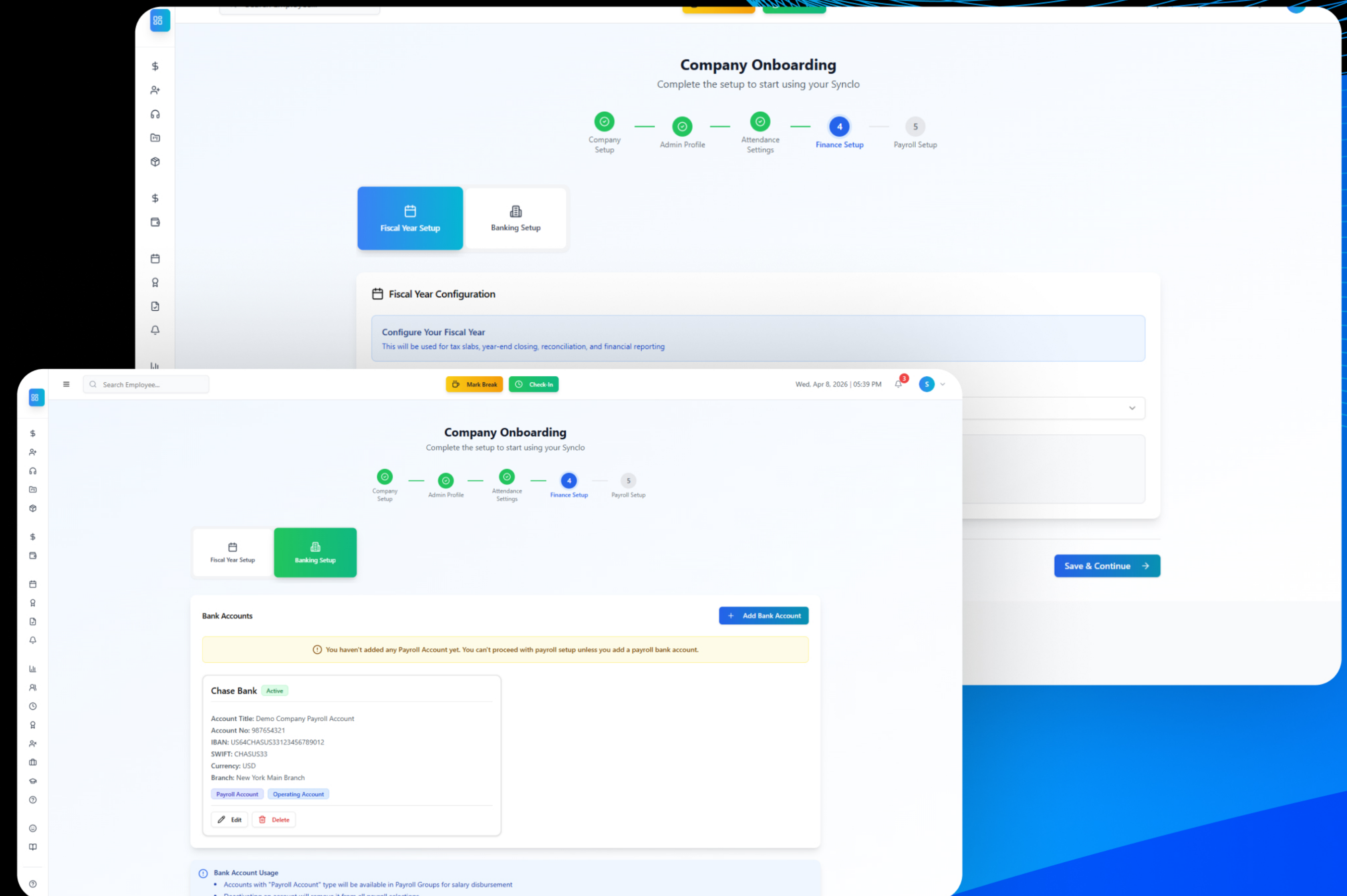
# Finance Setup

Finance configuration ensures that payroll and financial workflows operate correctly.

Settings configured here include:

- Fiscal Year
- Company Bank Account

The fiscal year determines reporting periods, while the bank account is used for payroll and financial transactions.



# 8.

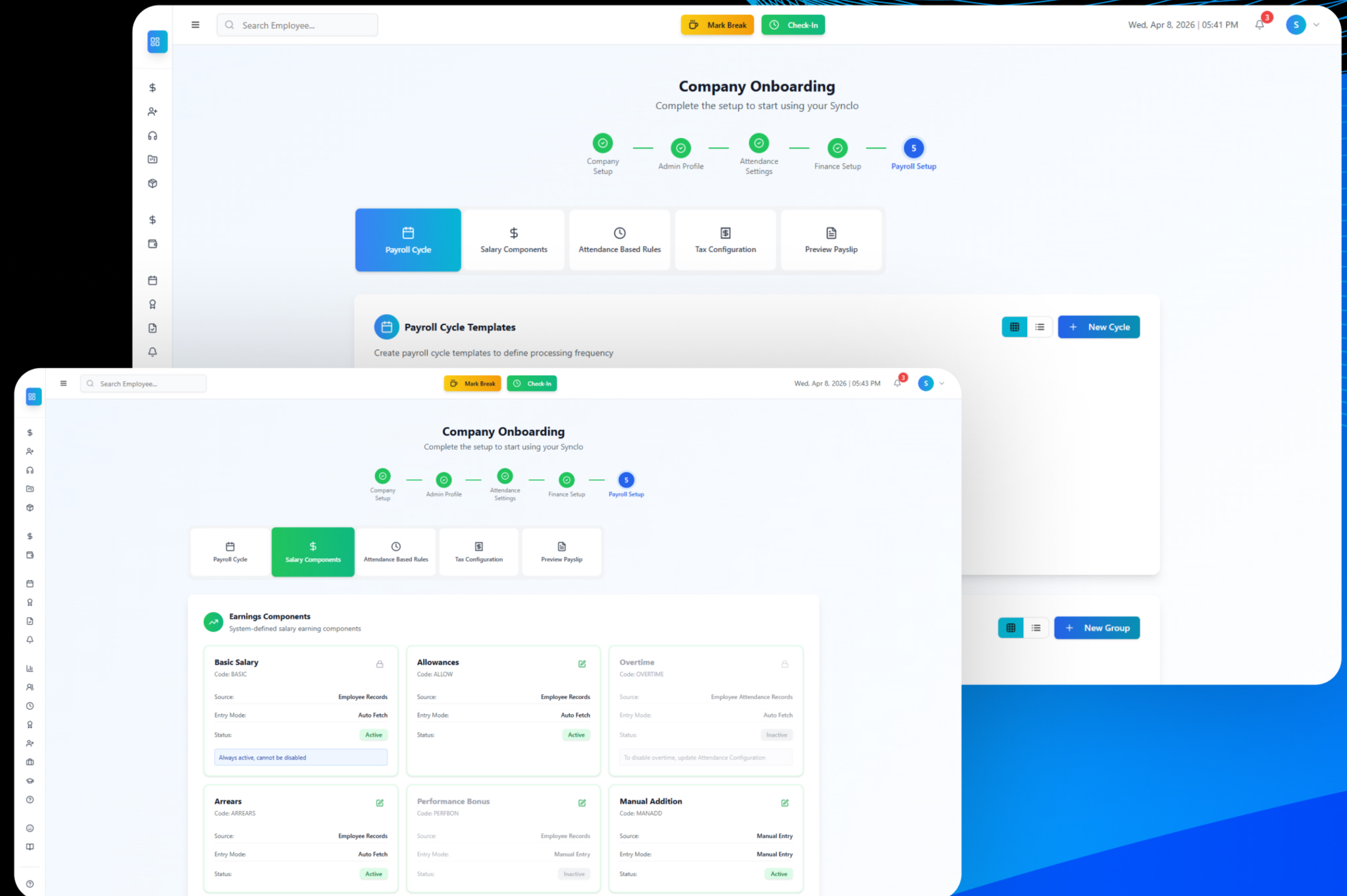
## Payroll Setup

Payroll configuration defines how employee salaries and payroll cycles operate.

### Configurations include:

- Payroll cycles
- Cutoff dates
- Employee payroll groups
- Salary components

Synclo includes default salary components that can be activated, modified, or expanded as needed.



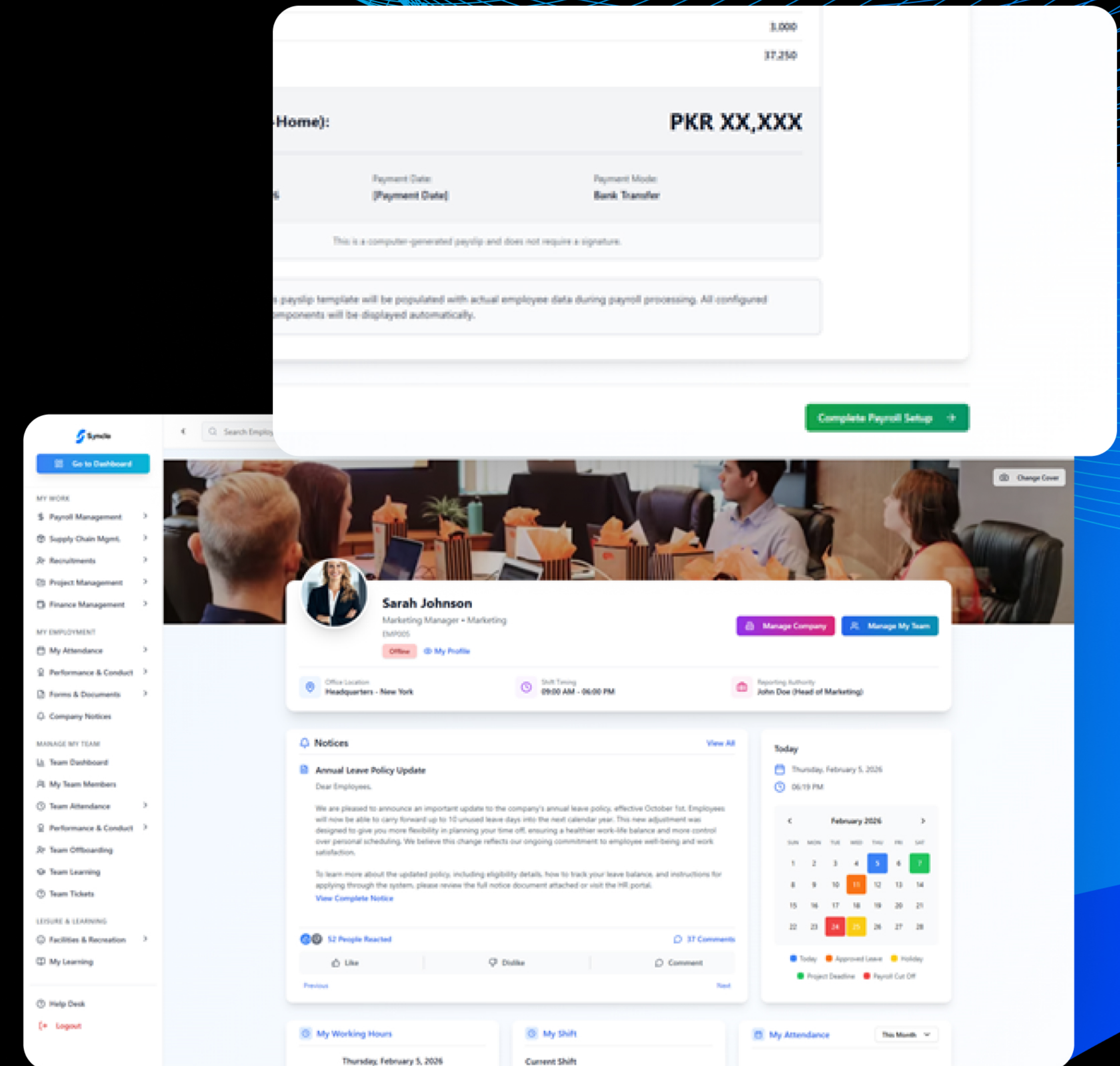
9.

# Complete Onboarding

Once all steps are completed, click the “Complete Onboarding” button.

At this point:

- Your company setup is finalized
- The Synclo dashboard becomes active
- You can begin adding employees and managing operations



Your company is now set up.

Operate with confidence. Scale with Synclo.

