

# Employee Management GUIDE

Adding employees in Synclo is flexible and structured. Organizations can onboard employees using Quick Add, Bulk Add, or a Detailed Employee Setup process. This document explains each method and indicates where screenshots should be placed for product documentation.

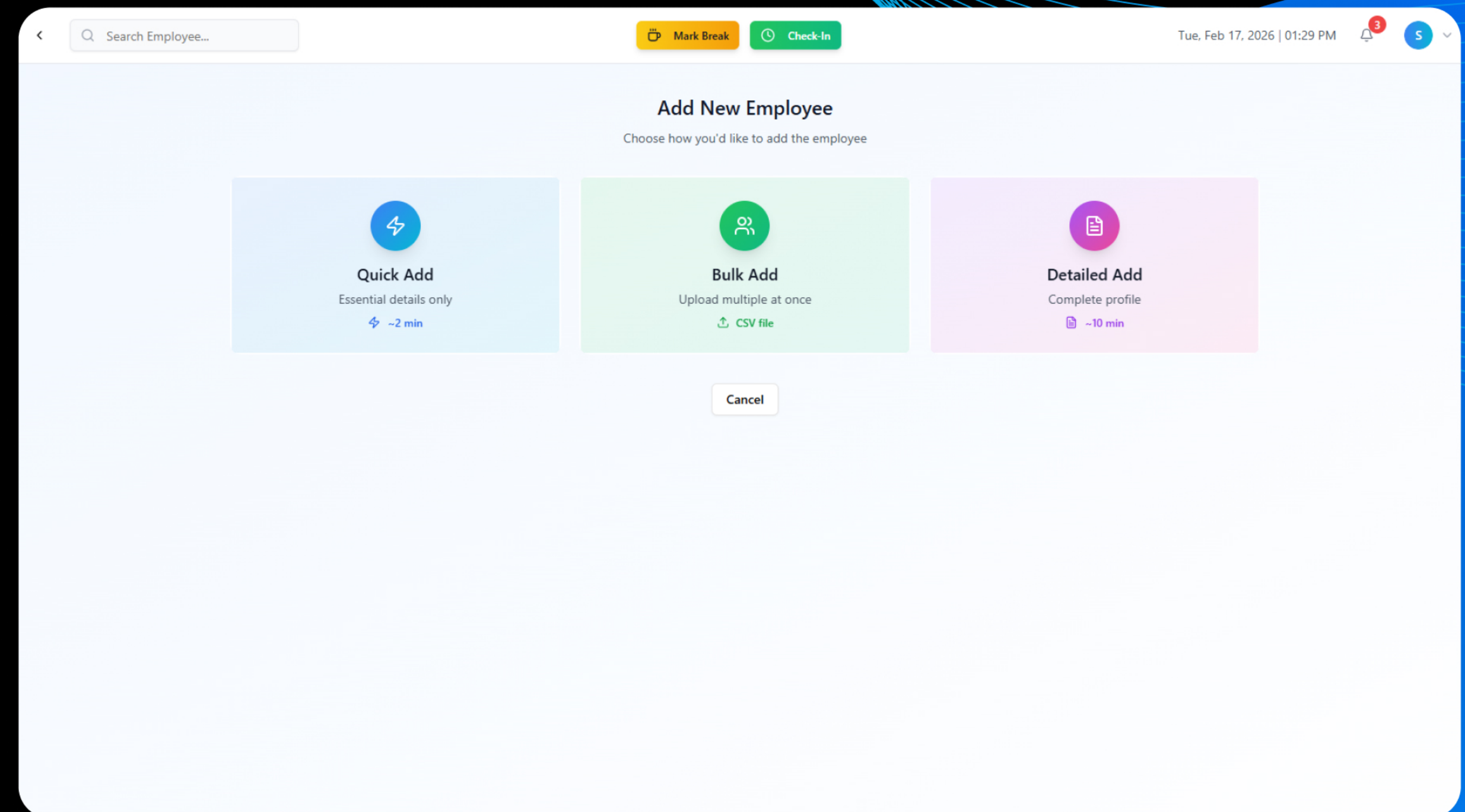
1.

# Access the Add Employee Option

To begin adding employees, navigate to the Employee Management section within Synclo.

## Steps:

- Open the Employee Management module
- Click "Add New Employee"
- Choose the method for adding employees



2.

# Quick Add Employee

Quick Add allows administrators to add employees quickly using only essential information.

## Typical fields:

- Employee Name
- Email Address
- Department
- Designation

This method is ideal when quickly onboarding employees while adding detailed information later.

The screenshot displays the 'Quick Add Employee' interface within the Synclo HR system. The page title is 'Quick Add Employee' with the subtitle 'Add employee with essential details'. A 'Back' button is located in the top right corner. A toggle switch for 'With Grade Structure' is also present. The form is titled 'Quick Add Form' and instructs the user to 'Fill in the essential details'. It is organized into several sections: 'Personal Information' includes fields for 'Full Name' (with a note that username and email will be auto-generated), 'Personal Email Address', 'Phone' (with separate fields for code and number), 'Date of Birth', and 'Gender'. 'Employment Information' includes 'Department', 'Grade (Select department first)', 'Designation (Select grade first)', 'Reporting Authority' (with a search field), 'Date of Joining', 'Employment Type', 'Work Mode', and 'Duration of Probation Period'. A left-hand navigation menu lists various HR management tasks, with 'Add New Employee' highlighted. The top navigation bar includes a search bar, 'Mark Break', 'Check-In', and the current date and time.

## 2.1

# Quick Add with Grading

If your organization uses employee grading structures, the Quick Add form will include a grade selection field.

## Fields may include:

- Employee Name
- Designation
- Email Address
- Grade
- Department

## 2.2

# Quick Add without Grading

If grading is not enabled, the Quick Add form will appear without grade options.

This version only includes essential employee details required to create the employee record.

The screenshot displays the 'Quick Add Employee' form in the Syncro HR system. The form is titled 'Quick Add Employee' and includes a 'Without Grade Structure' toggle. The form fields are organized into sections: Personal Information (Full Name, Personal Email Address, Phone, Date of Birth, Gender), Employment Information (Department, Designation, Reporting Authority, Date of Joining, Employment Type, Work Mode, Duration of Probation Period, Location), and a 'Go to Dashboard' button. The left sidebar shows the 'MANAGE COMPANY' menu with 'Add New Employee' highlighted.

3.

# Bulk Add Employees

Bulk Add allows organizations to import multiple employees at once.

## Typical process:

1. Download the employee import template
2. Fill in employee details in the template
3. Upload the completed file
4. Syncco automatically creates employee profiles

This method is recommended for onboarding large teams.

The screenshot shows a web application interface for "Bulk Add Employees". At the top, there is a search bar labeled "Search Employee...", a "Mark Break" button, a "Check-In" button, and a date/time indicator "Tue, Feb 17, 2026 | 01:39 PM". The main heading is "Bulk Add Employees" with a "Back" button. Below the heading, it says "Upload multiple employee records using a CSV file. [How it works](#)". The interface is divided into two steps: "Step 1: Download Template" with a "Download Template" button, and "Step 2: Upload Filled Template" with a "Choose File" button and a "Process" button. The "No file chosen" text is visible next to the file selection button.

4.

# Detailed Employee Setup

Detailed Add allows administrators to create complete employee profiles with full information.

The detailed process includes multiple sections such as personal information, job details, salary configuration, academic history, work experience, documents, and access permissions.

4.1

## Personal Information

This section captures basic employee identity details.

Information may include:

- Full Name
- Date of Birth
- Gender
- Contact Details
- Address

The screenshot shows the 'Detailed Employee Onboarding' interface. The top navigation bar includes a search bar, 'Mark Break', 'Check-In', and a date/time indicator. The left sidebar lists various management options under 'MANAGE COMPANY'. The main content area is titled 'Detailed Employee Onboarding' and contains a 'Personal Information' section with the following fields:

- Profile Picture:** A file upload field with the text 'Choose File No file chosen' and a note 'Upload a profile picture (Max 5MB)'.
- Full Name \*:** A text input field with a note 'Enter full name' and 'Username and work email will be auto-generated from this name'.
- Date of Birth \*:** A date picker field with the format 'yyyy/mm/dd'.
- Phone Number \*:** A field with a country code dropdown set to '+1' and a phone number input '3012345678'.
- Personal Email Address \*:** A text input field with the value 'personal@email.com'.

# Add Family Member

Family member information can be added when required for HR or benefits records.

# Add Emergency Contact

Emergency contact details ensure the organization has a contact person available in emergency situations.

## Information may include:

- Contact Name
- Relationship
- Phone Number

The image shows a screenshot of an HR system interface with two modal forms overlaid on a background form. The background form is titled 'Permanent Address' and includes fields for 'Country', 'State/Province', 'City', and 'Street Address'. It also has a 'Family Information' section and an 'Emergency Contacts' section. The top right of the background form shows 'Tue, Feb 17, 2026 | 01:40 PM' and a 'Same as Current Address' checkbox. The top left has a search bar 'Search Employee...'. The top right has 'Mark Break' and 'Check In' buttons. The bottom left has 'Previous' and 'Draft' buttons. The bottom right has a 'Save & Continue' button.

The first modal form is titled 'Add Family Member' and contains the following fields:

- Name \* (Text input with placeholder 'Full name')
- Relation \* (Dropdown menu with placeholder 'Select relation')
- CNIC (Text input with placeholder 'CNIC number')
- Date of Birth (Text input with placeholder 'yyyy/mm/dd' and a calendar icon)

The second modal form is titled 'Secondary Phone Number' and contains the following fields:

- Secondary Phone Number (Text input with placeholder '+1 234 567 8900')
- Relationship \* (Dropdown menu with placeholder 'Select relationship')

4.2

# Job Details

The Job Details section defines the employee's role within the organization.

## Typical fields include:

- Department
- Designation
- Reporting Manager
- Joining Date
- Employment Type

The screenshot displays the 'Detailed Employee Onboarding' interface in the Synclo system. The page title is 'Detailed Employee Onboarding' with a subtitle 'Complete employee profile with all information'. A 'Cancel' button is located in the top right corner. The interface features a navigation menu on the left under 'MANAGE COMPANY' with options like 'Company Setup', 'Employee Management', and 'Attendance Management'. The main content area has a horizontal tab bar with 'Job Details' selected. Below this, the 'Job Details' section is titled 'Define employment information' and contains several form fields: 'Department \*' (set to 'Human Resources'), 'Designation \*' (set to 'HR Manager'), 'Job Role' (with a dropdown 'Select job role (optional)'), 'Reporting Authority' (with a search field 'Search by name...'), 'Joining Date \*' (with a date picker), 'Duration of Probation Period' (with a dropdown 'Select probation period'), 'Shift' (with a dropdown 'Select shift'), 'Location' (with a dropdown 'Select location'), 'Employment Type \*' (set to 'Full-Time'), and 'Work Mode \*' (set to 'Hybrid'). A 'Without Grade Structure' toggle is visible on the right side of the form area.

## 4.3

# Salary and Benefits

This section defines the employee's salary structure and payroll configuration.

## Information may include:

- Salary components
- Allowances
- Bonuses
- Payroll group assignment

The screenshot shows the 'Detailed Employee Onboarding' interface in the Syncro HR system. The page is titled 'Detailed Employee Onboarding' and includes a search bar for employees. The main content area is divided into several tabs: Personal Information, Job Details, Salary & Benefits (selected), Academic Details, Work Experience, Documents, Access & Permissions, and Preview & Invite. The 'Salary & Benefits' section is active, showing 'Basic Salary Information' with a 'Basic Salary' of 95000 and a 'Salary Frequency' of Monthly. Below this, it shows 'Gross Salary' as 'Total package' and 'Allowances' as 'Auto-mapped from Grade'. A yellow warning box at the bottom states 'No allowances mapped to this grade' and provides a 'Go to Grade Setup' link. The left sidebar contains a 'MANAGE COMPANY' menu with various options like 'Company Setup', 'Employee Management', and 'System Settings'. The top right corner shows the date and time: 'Tue, Feb 17, 2026 | 01:44 PM'.

## 4.4

# Academic Details

Employee academic history can be recorded here.

## Typical fields:

- Institution
- Degree
- Field of Study
- Graduation Year

The screenshot shows the 'Detailed Employee Onboarding' interface in the Syncro HR system. The page is titled 'Detailed Employee Onboarding' and includes a search bar for employees. A navigation menu on the left lists various HR functions, with 'Academic Details' highlighted. The main content area shows a progress bar with steps: Personal Information, Job Details, Salary & Benefits, Academic Details (active), Work Experience, Documents, Access & Permissions, and Preview & Invite. Below the progress bar, there is a section for 'Academic Details' with a sub-header 'Add educational qualifications (Optional)'. A dashed box indicates that no academic details have been added yet, with a '+ Add Academic Details' button. At the bottom, there are navigation buttons for 'Previous', 'Skip', 'Draft', and 'Save & Continue'. The top right corner shows the date and time: 'Tue, Feb 17, 2026 | 01:46 PM'.

4.5

# Work Experience

Previous work experience can also be recorded.

## Typical information:

- Company Name
- Job Title
- Duration of Employment
- Responsibilities

The screenshot displays a web interface for 'Detailed Employee Onboarding'. At the top, there is a search bar, 'Mark Break' and 'Check-In' buttons, and a date/time indicator. The main heading is 'Detailed Employee Onboarding' with a 'Cancel' button. Below this is a progress bar with tabs for 'Personal Information', 'Job Details', 'Salary & Benefits', 'Academic Details', 'Work Experience' (highlighted in green), 'Documents', 'Access & Permissions', and 'Preview & Invite'. A 'With Grade Structure' toggle is visible. The 'Work Experience' section is titled 'Work Experience' and includes the instruction 'Add previous work experience (Optional)'. It shows a large empty box with a briefcase icon and the text 'No work experience added yet', along with a '+ Add Work Experience' button. At the bottom, there are 'Previous', 'Skip', and 'Draft' buttons, and a large blue 'Save & Continue' button.

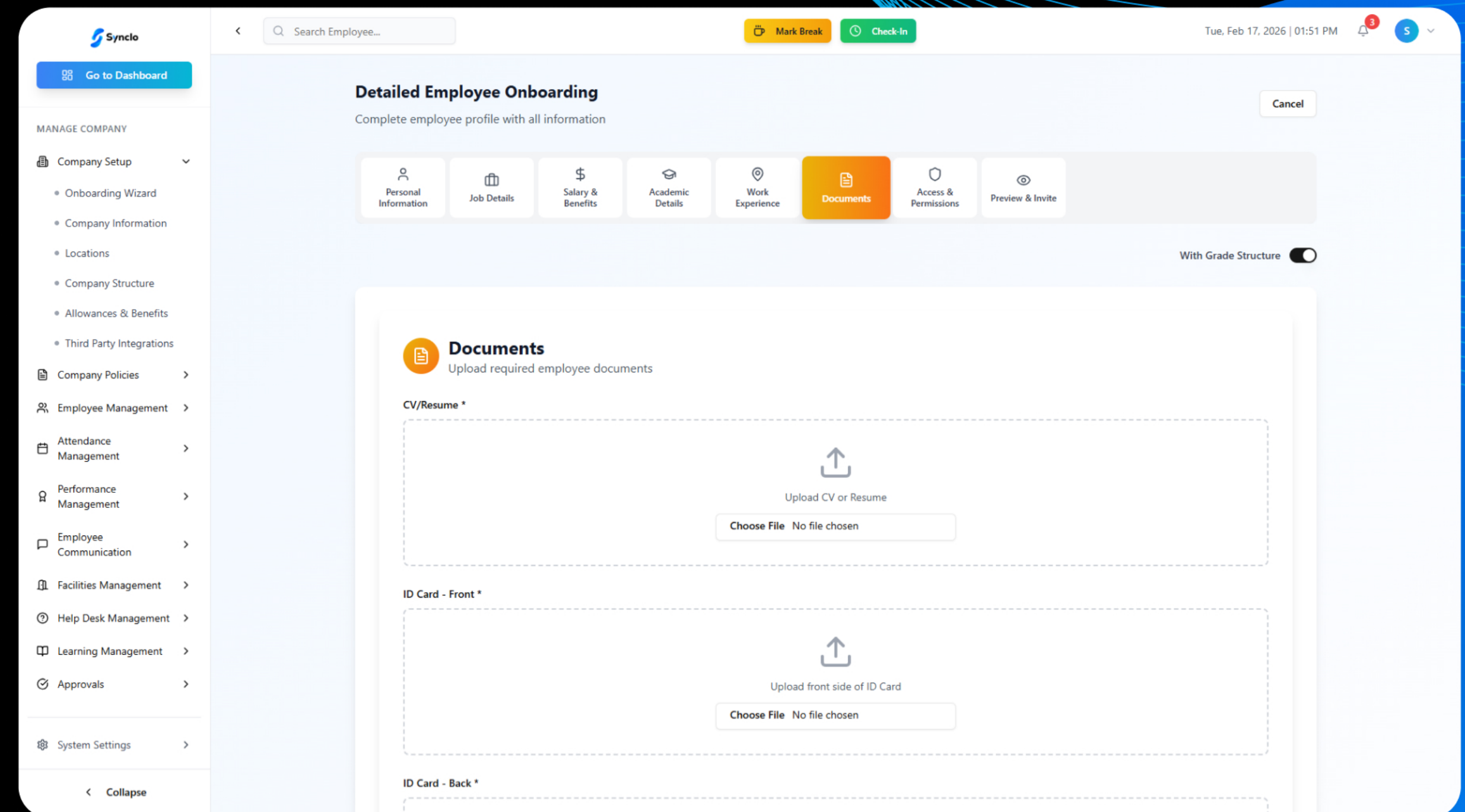
4.6

# Documents

Administrators can upload important employee documents such as:

## Typical information:

- Identification documents
- Contracts
- Certifications
- Legal paperwork



4.7

# Access and Permissions

Access settings determine which parts of the system the employee can access.

## Configurations may include:

- Role assignment
- Module permissions
- Login access

The screenshot displays the 'Detailed Employee Onboarding' interface in the Synclo system. The page title is 'Detailed Employee Onboarding' with the subtitle 'Complete employee profile with all information'. A 'Cancel' button is located in the top right corner. The interface features a navigation bar with tabs for 'Personal Information', 'Job Details', 'Salary & Benefits', 'Academic Details', 'Work Experience', 'Documents', 'Access & Permissions' (which is the active tab), and 'Preview & Invite'. A 'With Grade Structure' toggle is visible on the right side of the navigation bar. The main content area is titled 'Access & Permissions' with the subtitle 'Configure system access and user role'. Below this, there is a 'System Access' section with a 'Regenerate' button. A note states: 'Note: Username and Work Email are automatically generated from the Full Name and kept in sync. Editing one will update the other. The work email domain is based on your company website.' There are two input fields: 'Username' (containing 'username') and 'Work Email Address \*' (containing 'username@democompany.com'). Below these is the 'User Role & Permissions' section, which includes a 'User Role \*' dropdown menu (currently showing 'Select role') and a note: 'Select employee's access level'. At the bottom of the form, there are 'Previous' and 'Draft' buttons. The left sidebar shows a 'MANAGE COMPANY' menu with various options like 'Company Setup', 'Company Information', 'Company Policies', etc. The top of the page includes a search bar, 'Mark Break', 'Check-In', and a date/time indicator: 'Tue, Feb 17, 2026 | 01:52 PM'.

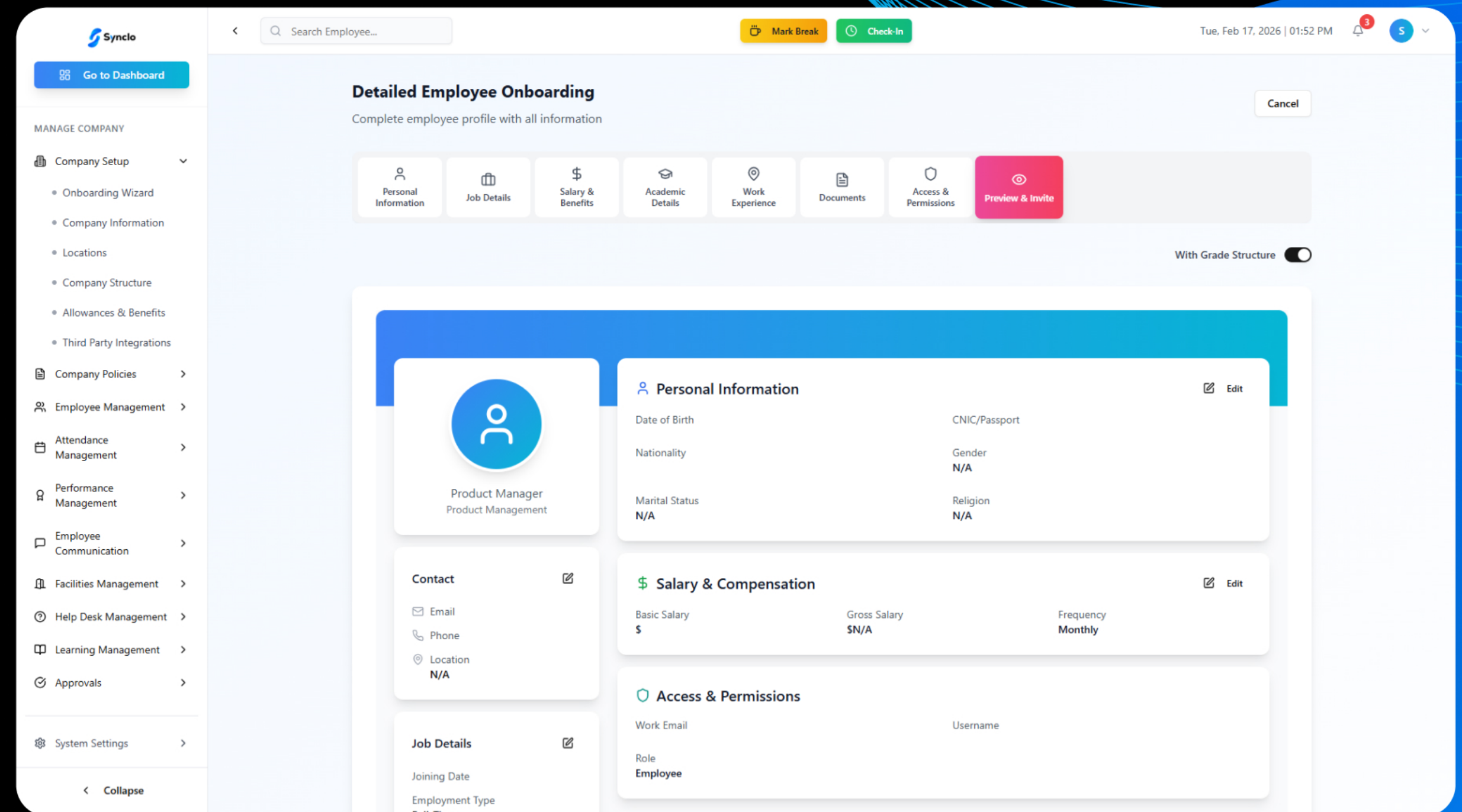
4.8

# Preview and Invite

Before finalizing the employee profile, administrators can review all entered information.

## Once confirmed:

- Click “Invite Employee”
- The employee receives an invitation email to access the system

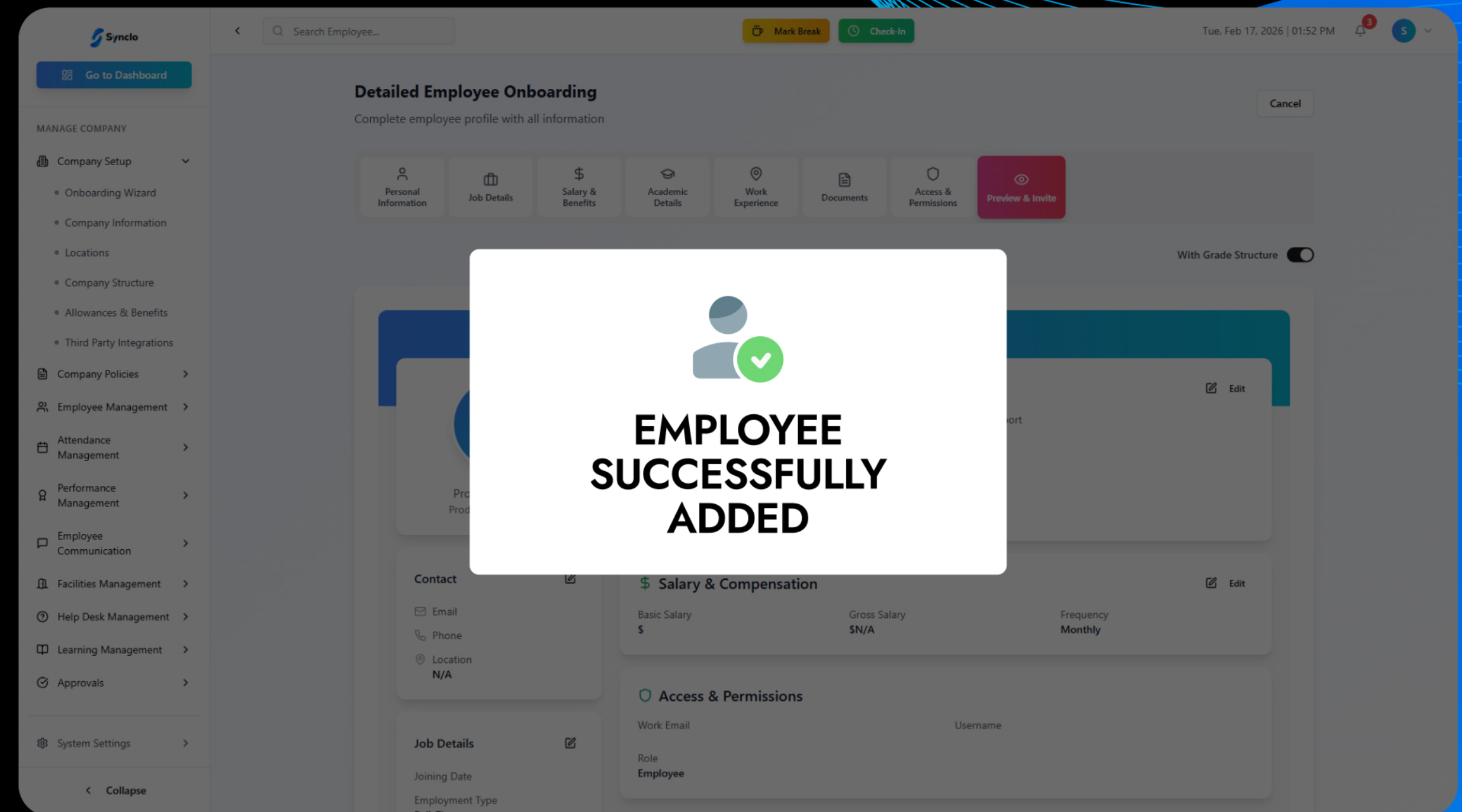


# Employee Successfully Added

After sending the invitation, the employee profile becomes active within Synclo.

## Administrators can now:

- Assign projects
- Track attendance
- Manage payroll
- Monitor employee performance



# Your team is set up.

Manage your team with confidence using Synclo.

