QUICK-START · COMPANY ADMIN

Get your company running on Nexura

You created the workspace. These steps take your company from empty to first payroll. Your Dashboard shows a “Get your company ready” card that ticks each step off as you go.

About 1 hour, plus your employee sheet

1. Set up the basics

1 **Sign in**

Open your company address (yourcompany.hrms.nexuragt.com, in your welcome email) and sign in with your email and password.

2 **Add company details**

System Administration → Settings

Legal name, PAN, TAN, address, PF and ESIC numbers, weekly offs and probation length. Click Save Settings.

3 **Turn on two-step sign-in for yourself**

My Portal → My Profile

Recommended for every Admin. You can require it for HR and Admins under Settings → Security policy.

2. Add your people

1 **Download the Excel template**

Employee Lifecycle → Directory → ↑ Bulk upload

Click ↓ Download Excel template.

2 **Fill it in**

One row per employee: Employee ID, name, work email, joining date, department, designation, location, manager (their Employee ID) and monthly salary in the “Salary: …” columns. Rename or add salary columns to match your own salary heads.

3. **Upload and check**

   Tick “Create missing departments, designations, … and salary components”, upload the file, review the preview and click Import. Salary structures are created from the salary columns.

3. Check leave, holidays and statutory rates

1. **Leave types**
   System Administration → Master Data → Leave Types, then Workforce → Leave Type Configuration

   Adjust days per year and the rules (accrual, carry-forward).

2. **Holidays**
   Workforce → Holidays

   Add your holiday list for the year.

3. **Statutory rates**
   Payroll & Tax → Statutory Rates

   Check PF, ESI, Professional Tax and LWF for your states, then Save Rates.

4. Bring your team in

1. **Employees and managers sign themselves in**

   No logins to create. They open your company address, click “Email me a sign-in code”, and type their work email and the code. Their first sign-in creates the login; anyone with people reporting to them becomes a Manager automatically. Send them the Employee quick-start.

2. **Create logins for HR**
   System Administration → Users & access → + New User

   HR and Admin logins use a password. Leave “Employee record” on “Find by email automatically”.

3. **Give part of HR to someone**
   Users & access → Access

   Pick a ready-made role such as Payroll HR or Recruiter, or tick exactly the modules they need.

5. Run your first payroll

1. **Create and process the run**
   Payroll & Tax → Processing
   ＋ New Run → choose the month → Create Run → Process.

2. **Review**
   Read the “To check before paying” list and download the Register to spot-check. Fix anything at the source and click Re-process.

3. **Pay and close**
   Download the Bank File for your bank, pay, then set the run to Paid. Employees see their payslips in My Portal.

Good to know

- Choose a plan under System Administration → Billing before your free trial ends.
- Every report downloads as an Excel file with the ⬇ Excel button.
- Have your accountant check the statutory rates and your first processed run before you pay salaries.